

THE VALE OF GLAMORGAN COUNCIL

GOVERNANCE AND AUDIT COMMITTEE: 20TH MAY, 2024

REFERENCE FROM CORPORATE PERFORMANCE AND RESOURCES
SCRUTINY COMMITTEE: 17TH APRIL, 2024

“1009 ORACLE FUSION IMPLEMENTATION (DCR) –

The report was presented to the Committee by the Head of Finance/Section 151 Officer, the purpose of which was to review the implementation of Oracle Fusion in order to inform the efficient running of future significant Council programmes and projects. A presentation was also provided, in order to illustrate the main headlines around this piece of work, its findings and subsequent implementation of the lessons learnt. The key points included:

- The Council’s Oracle EBS system which covered the financial ledger, procurement, debtors, HR and payroll had been in place for over ten years and was to cease to be supported in December 2021 as Oracle continued the roll out of its successor product, Oracle Fusion.
- A business case was in place for the system’s replacement and move to Oracle Fusion in January 2022 with the implementation to have a Go Live cost of £1.5m.
- The project suffered from a number of delays, including the disruption and challenges to capacity caused by Covid-19, which as a consequence had led to the final cost of the new system being significantly greater than planned.
- Cabinet had been kept apprised of the progress of the project and the revised dates for Go Live and the additional costs incurred.
- A commitment was given to undertaking a lessons learnt exercise once the new system was up and running. The system went live in April 2023 but the exercise was put on hold until a contractual dispute with the System Implementer was resolved in the summer.
- A very comprehensive lessons learnt exercise had been undertaken which was led by the Council’s external Project Manager who had initially been brought in mid-way through the project when it was first identified that additional resource was required to manage the implementation.
- The lessons learnt work had been carried out using a specific software package which the Council could use in similar reviews in the future.
- 59 lessons were identified which had been organised across four themes where were broadly in line with the lifecycle of such an implementation:
 - i. Organisational capacity to run effective projects;
 - ii. Project management methodologies and effective use of project tools;
 - iii. Testing infrastructure and testing capability; and
 - iv. Effective project team planning.
- There were a number of detailed recommended actions and the 38 priority ones were set out in the body of the report.

Following the report, the Chair thanked the Head of Finance/Section 151 Officer for the comprehensive presentation and the amount of work that had been put into the production of the lessons learnt work. She said that the report highlighted the shared skills challenges that this and other Local Authorities faced with the lack of IT and Procurement specialist officers, but also what happens when Local Authorities try to conduct an exercise on this scale without the essential specialist knowledge from the outset working on the commissioning and the drawing up of the specification. This lack of expertise essentially being the root cause of the “perceived” overspend, as it would not have been possible to work out the indicative value of an exercise without knowing what the fixed and variable costs would be, what resource would be required to implement such a project.

The Committee subsequently made a number of comments and queries concerning the reports and its findings. These included the following points:

- The Committee, whilst welcoming the report and the lessons learned as part of this, raised their concerns on the costs and issues that had emerged from the implementation of Oracle Fusion. The Director of Corporate Resources appreciated the concerns and comments raised about the report and implementation of the new Oracle system, but stressed that the report was an honest account of the challenges faced due to implementing the new system and the lessons learned from this would be taken on board by the Vale of Glamorgan Council going forward.
- The Chair (and Head of Finance/Section 151 Officer) explained that other Welsh Local Authorities had faced similar issues with implementing new software and IT systems, including the lack of specialist support and the challenges faced in moving from a server based to a cloud-based IT system.
- The Chair also pointed out that senior officers that had been involved in the initial process were no longer working for the Vale of Glamorgan Council.
- Councillor Dr. Johnson felt the report offered a sober update, and although the Council had ‘got there in the end’ in terms of implementation of the new Oracle system, this had come at the cost of a significant overspend and questions on the processes and expertise in place around procurement and project management. He also pointed to the seemingly lack of communication and information sharing between the Council and Elected Members concerning the project, with an over-reliance on using Emergency Powers and therefore insufficient scrutiny of the project. He also suggested that the report, with any comments or recommendations provided by this Committee be referred on to the Governance and Audit Committee as well as Cabinet for their consideration. He asked where the Council was going in terms of lessons learned; whether the ‘waterfall’ approach with regard to the Project Management Toolkit needed review or was fit for purpose; what the Audit Wales perspective was on this; concerns on the internal risk assessment and were the issues flagged by the Strategic Leadership Team (SLT); and the need to stop this happening again in future. The Director of Corporate Resources, with the Head of Finance/Section 151 Officer, addressed these comments and queries, stating that Audit Wales had been made aware of this matter, and had been kept updated via financial monitoring reports and regular discussions, including a future piece of work around financial

sustainability. The project management toolkit was currently being reviewed and the findings from this would be shared with all the relevant Council officers. On the question around the balance of risk of going live with a system that was not sufficiently robust and tested versus the additional overspend/expenditure, this was at the forefront of Council thinking and was the subject of considerable discussion at SLT. December and January were not feasible to roll out the new system, with February and March also difficult, due to ongoing system bugs and the need to close down payroll for the financial year accurately.

- On Councillor Dr. Johnson's comments on the WCCIS retender, the Chair stated this had been put on the Risk Register for Governance and Audit Committee, which related to a national tendering exercise, rather than an internal one, such as Oracle Fusion. Also, the Chair agreed that the report should go to Governance and Audit Committee at the earliest opportunity.
- Councillor Carroll was surprised by the Council's attitude to public finances with regard to the project overspend, and queried what assessment had been undertaken at the beginning of the project on the capacity and resources to deliver this project. It was explained that such lessons had been drawn out in the third theme of the report's priority recommendations. Furthermore, there had been a 'reset' as part of the project with more thorough planning on the resources required. On the Councillor's follow up question on whether similar issues had been experienced with other Council procurement projects, etc. it was explained that due to its scale, the Oracle project was different to most other Council procurement projects and had been impacted by a lack of certain key technical expertise. Such issues had been incorporated into the report and lessons learned, in order to help other projects going forward. On project overspends here and elsewhere, the Operational Manager – Accountancy, stated this project (and others) had a dedicated cost centre in order that costs could be monitored, and other large projects would be reported on via the quarterly Capital Monitoring reports.
- The Chair pointed out that going forward the Council would have support from Ardal for procurement on a larger, more strategic scale. The Oracle system was a new, cloud-based system, which the Council would not have had the expertise to address solely on its own and internally. As part of the lessons learnt exercise the Council now had a Head of Digital that would have the experience, skills and understanding to assist in the commissioning of similar services in future. This would help support the indicative value that would be put on the total cost of such projects and procurement in future, which would also be bolstered by the guidance that Ardal and the collaborative arrangement with them would provide. This would leave the Council in a much better position than it previously was in.
- Councillor Loveluck-Edwards asked about how learning the lessons from the project would take shape, the timelines involved, the Committee's involvement in the review, on reaching out to other authorities using the new system, what the lifespan of Oracle was and was it now 'fit for purpose'. In response, the Director of Corporate Resources referred to the Action Plan being developed in tandem with the report. The Head of Human Resources and Organisational Development stated that the Council had reached out to other local authorities in England and Wales concerning their use of the new system, but no significant lessons could be drawn. Due to the advancements on the Vale's

version of the system, it was 'going it alone' to some degree and the Council was now seen as an expert in this area. The Head of Finance/Section 151 Officer, referred to the new systems longevity, which would be longer due to it being a cloud-based solution. Rolling reviews would be undertaken of the system to ensure that it was fully functioning and had been properly embedded.

- The Executive Leader and Cabinet Member for Performance and Resources stated it was important to look at this report constructively and not be a 'finger pointing' exercise, referring to the challenges in getting this report produced and the benefits of having Ardal as a partner in large scale procurement schemes.
- Councillor Haines raised a number of points, including the Council needed to improve its skills base and IT literacy of its staff, in order to upskill its workforce by developing in-house skills and technical capacity to undertake major projects, including greater expertise with procurement, as well as utilising its existing skills and technical, specialist, base, such as staff based in ICT, to assist with such projects. That the Council needed to look at building teams focused on project management, where required, as well as employing a project manager. It was important to have a team structure in place by drafting staff from across the Council with the requisite skills to help in implementing the relevant project. Also, the Council needed to look at its organisational capacity for new projects, i.e. to review the use of the Capability Maturity Model against other alternatives, such as the Quality Management System (QMS). In response, the Council had faced challenges in obtaining the necessary specialist skills internally hence the need for external consultants. Developing such skills internally, the use of more 'joined-up' training between Directorates and the Capability Maturity Model would be looked at.
- The Vice-Chair referred to the benefits, in light of this report, of having a new Head of Digital in place to increase the literacy of ICT staff and the review of procurement through the Committee's Task and Finish Group. He also referred to the importance of communications to Councillors and stakeholders on such projects, and Lesson 36 of the report regarding entry and exit gates for different phases of the project, when SLT was made aware of these phases, what mitigating factors were employed and when did SLT know about the transfer issues concerning payroll. Also, were the Accountancy Team made aware of these issues and involved in assessing the additional costs of external consultancy because of this. In response, the Director of Corporate Services would liaise with the Task and Finish Group about the report and share it with Ardal. The Head of Digital would be looking to raise IT literacy across the Council. The Head of Human Resources and Organisational Development referred to the entry and exit gates for the project, which had been a challenge in certain phases of the project, such as with payroll, with the need to meet the necessary threshold in order to progress through the gateways. SLT was kept updated on this progress and the Accountancy Team were heavily involved in the process.
- Councillor Dr. Johnson referred to the lack of transparency in the initial decision making process on implementing the project, the sign off process, the lack of realisation of the difficulties that would be faced by the project at the beginning and on the use of Emergency Powers. He also asked about the

involvement of the Council's Legal officers in the project. It was explained that the use of Emergency Powers had been applied correctly in April 2022 and the report recognised that the project had not been recognised as a high risk undertaking at the beginning. However, once key issues had been identified, the Council's Legal team had been involved. The Operational Manager, Legal Services explained that in-house legal services were not involved in the procurement process but later on in the call-off contact phase with the System Implementer. However, external legal advice, expertise and support was still required in order to handle the contractual dispute that had arisen between the Council and Evosys, the System Implementer. This was subsequently resolved shortly after the system went live, in April 2023.

- It was also suggested, if possible, that any minutes from meetings of the Strategic Leadership Team (SLT) connected to the decision-making process for the implementation of Oracle be referred with the report to the Governance and Audit Committee and then on to Cabinet.
- On Councillor Haines' query on the merits of having had this project gone out to tender rather than a call off contract process, it was explained by the Chair and the Head of Finance/Section 151 that the latter process involved a 'mini competition' between a small number of tenderers. Due to the specialist nature of the services involved and the limited pool of suppliers able to provide a cloud-based ERP system at the time, it seemed unlikely that any more tenderers would have come forward even through an open tendering process.
- The Chair explained that using an established IT Specialist Procurement Framework to call off a contract provided security to the authority in terms of the due diligence that the Managing Authority (Crown Commercial Services in this case) would have carried out on the suppliers and the terms and conditions underpinning the Framework would have been robust and specific to the IT category. However, it was likely that the biggest issue here would be that without that critical IT expertise at the start of the project, the statement of requirement (specification) would not have contained the level of detail and made clear exactly what was needed, and who would be responsible leading to assumptions subsequently being made by both sides

Scrutiny Committee, having considered the report and all the issues and implications contained therein,

RECOMMENDED –

(1) T H A T the report (and related Action Plan) be referred to the Governance and Audit Committee and then on to Cabinet, including, if possible, any minutes from meetings of the Strategic Leadership Team (SLT) connected to the decision-making process for the implementation of Oracle.

(2) T H A T the following comments from the Corporate Performance and Resources Scrutiny Committee also be considered by the Governance and Audit Committee and Cabinet:

- The Committee, whilst welcoming the report and the lessons learned as part of this, raised their concerns on the costs and issues that had emerged from the implementation of Oracle Fusion;
- It was important that the Council take on board the lessons learned as part of this report, and that the issues raised by this report concerning procurement practices, the necessary preparation and specialist support at the start of major projects, etc. were fully addressed in order to prevent a repetition of these issues for other major projects undertaken by the Council in future;
- Consideration should be given to liaising with the Committee's Task and Finish Group on Procurement in relation to the issues raised within the report and to share the report with Ardal, who were supporting the Council's procurement services;
- Going forward, better and earlier communication to Elected Members and the relevant Committees concerning the progress of such major projects was essential in order to increase transparency, and to ensure Elected Members were kept informed of any issues and decisions made in a timely manner;
- The Council needed to improve its skills base and IT literacy of its staff, in order to upskill its workforce by developing in-house skills and technical capacity to undertake major projects, including greater expertise with procurement, as well as utilising its existing skills and technical, specialist, base, such as staff based in ICT, to assist with such projects;
- The Council needed to look at building teams focused on project management, where required, as well as employing a project manager. It was important to have a team structure in place by drafting staff from across the Council with the requisite skills to help in implementing the relevant project;
- The need for the Council to look at its organisational capacity for new projects, i.e. to review the use of the Capability Maturity Model against other alternatives, such as the Quality Management System (QMS).

Reasons for recommendations

(1) In order for both the Governance and Audit Committee and Cabinet to consider the report, the lessons learnt and the recommended actions as part of this review.

(2) For Governance and Audit Committee and Cabinet to consider the comments made by the Committee in relation to the report and its findings, as well as the suggestions and concerns raised by Members of the Committee, following their scrutiny of this report.”

Attached as Appendix: Report to Corporate Performance and Resources Scrutiny Committee: 17th April, 2024

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| Meeting of: | Corporate Performance and Resources Scrutiny Committee |
| Date of Meeting: | Wednesday 17 April 2024 |
| Relevant Scrutiny Committee: | Corporate Performance and Resources |
| Report Title: | Oracle Fusion Implementation |
| Purpose of Report: | To review the implementation of Oracle Fusion in order to inform the efficient running of future significant Council programmes and projects |
| Report Owner: | Director of Corporate Resources |
| Responsible Officer: | Head of HR & OD and Head of Finance/s151 Officer |
| Elected Member and Officer Consultation: | Strategic Leadership Team |
| Policy Framework: | The report is a matter for consideration by the Scrutiny Committee |
| <p>Executive Summary:</p> <ul style="list-style-type: none"> • The Council's Oracle EBS system which covers the financial ledger, procurement, debtors, HR and payroll had been in place for over ten years and was to cease to be supported in December 2021 as Oracle continued the roll out of its successor product, Oracle Fusion. • A business case was in place for the system's replacement and move to Oracle Fusion in January 2022 with the implementation to have a Go Live cost of £1.5M. • The project suffered from a number of delays, including the disruption and challenges to capacity caused by Covid-19, which as a consequence have led to the final cost of the new system being significantly greater than planned. • Cabinet have been kept apprised of the progress of the project and the revised dates for Go Live and the additional costs incurred. • A commitment was given to undertaking a lessons learnt exercise once the new system was up and running. The system went live in April 2023 but the exercise was put on hold until a contractual dispute with the System Implementer was resolved in the summer. • A very comprehensive lessons learnt exercise has been undertaken which was led by the Council's external Project Manager who had initially been brought in mid way through the project when it was first identified that additional resource was required to manage the implementation. | |

- The lessons learnt work has been carried out using a specific software package which the Council can use in similar reviews in the future.
- 59 lessons were identified which have been organised across four themes which are broadly in line with the life cycle of such an implementation:
 - i. Organisational capacity to run effective projects,
 - ii. Project management methodologies and effective use of project tools,
 - iii. Testing infrastructure and testing capability, and
 - iv. Effective project team planning.
- There were a number of detailed recommended actions and the 38 priority ones are set out in the body of the report.

Recommendations

1. That Corporate Performance and Resources Scrutiny Committee note the report and Appendix B, the full independent report along with the Part II item on this agenda.
2. That Corporate Performance and Resources Scrutiny Committee refer this report and Appendix B along with any comments/observations to Cabinet for consideration and action as appropriate.

Reasons for Recommendations

1. Corporate Performance and Resources Scrutiny Committee requested a review to be undertaken of the Council's implementation of Oracle Fusion.
2. It is important that any key areas of learning from the review are taken forward to improve the effectiveness of future projects undertaken by the Council.

1. Background

- 1.1 Up until 1 April 2023 the Council's system for general ledger and financial support, HR and payroll, customer relationship management and procurement was Oracle EBS which the Council had operated for ten or so years. In early 2020 Oracle had advised the Council that Oracle EBS which the Council had operated for ten years or so was now longer to be supported from December 2021.
- 1.2 A Business case was put forward in August 2020 for a replacement cloud based system, Oracle Fusion. There was a budgeted £1.5M implementation cost and ongoing running costs of £512.5K per annum. The Go Live was initially scheduled for 1 January 2022.

Table 1 – Oracle Fusion Implementation

| | Annual Recurring Cost | Total Cost over 8 Year |
|-------------------------|--------------------------|---------------------------|
| | £000 | £000 |
| One Off Costs | | |
| Implementation Partners | n/a | 1,200 |
| Internal Project Staff | n/a | 300 |
| | | 1,500 |
| Recurring Costs | | |
| Oracle Licence | 475.0 | 3,800 |
| Integration Costs | 37.5 | 300 |
| | 512.5 | 4,100 |
| Total | 512.5 | 5,600 |

- 1.3 The key benefits were anticipated to be:
 - Reduced future operating costs.
 - Predictable future operating costs.

- Simplified workflows and processes & enhanced customer experience.
- Lowered staff training costs.
- Stronger internal control environment.
- Reduced reliance on traditional workforce facilities (desks, phones etc).
- Up-skilling of internal staff as a result of project knowledge transfer.
- Future possibilities for providing council to council support to other authorities on similar projects.

1.4 The new system finally went live in April 2023, two years later than planned and at a greatly increased cost compared to that set out in the business case. Following the approval of the Business Case by Emergency Powers in August 2020 a direct award was made to Oracle for their Fusion cloud based system. The next step was the appointment of an implementation partner which was secured through a G Cloud procurement. Three companies had responded to the tender and following site appraisals and a period of evaluation a contract award was made to Evosys. A summary overview of the Contract is attached as Appendix A(i) and the full contract is attached as Appendix A(ii) to the Part II report, this is the only exempt information and the body of the Part I report is identical to the Part II. The contract was signed on 20 January 2021 and was for 14 months with ability to extend for up to two periods of 12 months on 90 days' notice. There was provision for notice to terminate 90 or 30 days depending on whether there were disputed sums. Given that it was a call off contract the Council was bound by the terms and conditions, these cannot be amended by the customer.

1.5 The key deliverables were:

- i. Implementation of the key system modules excluding Accounts Receivable and Fixed Assets
- ii. 12 weeks of post implementation support (hyper care) immediately after going live.
- iii. Data Load activities only.
- iv. Project Management costs through the implementation journey including 12 weeks of post implementation support.
- v. Training in line with 'Train the Trainer' approach.
- vi. Knowledge Transfer Activities.
- vii. Deployment of Evosys VBA to measure and monitor the outcomes, this was the Evosys value add to the Vale of Glamorgan.
- viii. Reports - As part of the fixed cost Evosys were to deliver:
 - All the standard out of box reports within the Oracle Cloud solution
 - Deployment of 'as-is' (without any changes) Evosys Local Government library of reports (over 120 in the Local Government repository)

1.6 The Council appointed its Project Manager early in February 2021. However, there was not sufficient progress made to achieving the November 2021 deadline and an appreciation that this would slip to January 2022. There was a reset of the project at the end of 2021 including the appointment of a replacement Project Manager and a review of the project plan culminating in a revised Go Live of August 2022.

- 1.7** It is worth reflecting on the impact of Covid-19 on the initial stages of the implementation. The UK had gone into full lockdown in March 2020 but there had been an easing of restrictions in the late spring and summer around the time the Business case was approved albeit Council capacity was significantly impacted with the numerous economic, wellbeing and safety support schemes being administered as well as the continued day to day challenges of service delivery. Covid cases picked up in the autumn leading to a second lockdown which was eased in the run up to the Christmas and then further tightening of restrictions which lasted well into the spring of 2021.
- 1.8** There have subsequently been a series of well documented delays reported through to Cabinet, directly and by way of Emergency Power decisions, which were reported on to Cabinet and Full Council for information.
- 1.9** The final Go Live cost is set out in detail in the table below.

1.10 Table 2 – Oracle Implementation Final Cost v Budget

| | Original | April EP | Nov Go Live | Final April 2023 Go Live |
|--------------------------------|----------|----------|-------------|--------------------------|
| | £000 | £000 | £000 | £000 |
| Support and implementation | 1,200 | 1,513 | 1,513 | 1,600 |
| Additional Environments | 0 | 35 | 76 | 110 |
| EBS Extension | 0 | 227 | 348 | 540 |
| Project management and support | 300 | 300 | 1,709 | 2,719 |
| Archiving | 0 | 100 | 100 | 117 |
| Training | 0 | 0 | 62 | 72 |
| Contingency | 0 | 0 | 0 | 100 |
| | 1,500 | 2,175 | 3,858 | 5,192 |

- 1.11** The April 2022 Emergency Power brought in replacement project management and resource to provide greater direction alongside extending support for the existing Oracle E Business Suite with the Go Live moved to August 2022. The extended timeline also impacted on the System Implementor costs which had also increased due to some Change Requests (additional requirements not covered by the original contract) relating to report writing and banking functionality not previously included within scope. Covid-19 had been a key factor in the delays to the Go Live.
- 1.12** However, across spring and summer 2022 there were extensive challenges and delays with key phases of the project, Data Migration and Payroll Parallel running, as well as a flaw in the absence design of the system which pushed the implementation initially back to 1 November. Some of these issues had arisen due to insufficient input at the system design stage early in the life of the project which was a product of a lack of capacity and the right skill set. Consequently, it was necessary to backfill the Council’s finance and HR teams, especially the payroll team to complete data migration and parallel payroll run activity

alongside running the Council's three monthly payrolls. These resources are specialist and in short supply and came at a high cost. There was also a further extension to the EBS licence for the existing system.

- 1.13** Good progress made in the early autumn but the absence design flaw which was being pursued at a UK level by Oracle persisted and the variances on the payroll parallel running were not in line with the agreed thresholds. This left the Council in a difficult position with a January Go Live being problematic due to shorter payroll deadlines across the Christmas period and February and March running into year end. As a result, the least risk option was to move the Go Live back to 1st April 2023 which meant retaining the external resource for a further five months.
- 1.14** The team had committed to undertake a Lessons Learnt review once the implementation was live. However, the System Implementor had initiated a change control in late 2022 which had given rise to a contractual dispute which was not resolved until some time after final Go Live. That has meant that the review was undertaken later than originally planned but has been given genuine rigour and has been brought to Scrutiny at the earliest opportunity.

2. Key Issues for Consideration

- 2.1** The reports to Cabinet during the course of 2022 outlined the key drivers for the delay to the original January 2021 Go Live date as well as setting out the additional resources necessary to complete the project. These are referenced below as background papers. At the same time a commitment to a comprehensive Lessons Learnt review post Go Live was given.
- 2.2** The Council's Oracle Fusion Project Manager who was engaged on an agency basis from January 2022 through to Go live in April 2023 was commissioned to lead on the Lessons Learnt review in September 2023. There has been a comprehensive approach and as part of the review the Project Manager was asked to cover:
- i. Key Purpose of Lessons Learnt.
 - ii. Achievement of the Council's Objectives via the Project.
 - iii. Issues with the Project leading to Project being Delivered Late and Over Budget.
 - iv. Undertaking of Lessons Learnt Activity
 - v. What Went Well?
 - vi. What Did Not Go Well?
 - vii. How do we Improve for the Benefit of Future Projects
 - viii. What Further Comments are Valuable to the Learning Process
 - ix. Principal Lessons and Learning
 - x. Next Steps for Enactment into future Council Projects
 - xi. Complete breakdown of Lessons Learned and accompanying recommendations.

- 2.3** The broad approach was to undertake a series of stakeholder interviews across all of the Fusion functions during September and October, conducted by the Oracle Fusion Project Manager and the Council's Business Improvement Team. These sought to identify the key successes and failings and the recording of this work has been supported by a Lessons Learned Database tool. The approach is described in greater detail in Section 14 of the full report which is attached at Appendix B.
- 2.4** It is important to recognise that in overall terms, despite the delay in Go Live and the cost overruns the broad objectives were met with a modern financial and HR/Payroll system in place which is sufficiently future proofed with an untailed/out of the box implementation.
- 2.5** The Key findings of the review are set out below across four broad themes:
- i. Organisation capacity to run effective projects;
 - ii. Project Management methodologies and effective use of project tools;
 - iii. Testing infrastructure and testing capability; and
 - iv. Effective project team planning.
- 2.6** The following sections will look at each of these themes in turn and outline the priority recommendations from the Lessons Learnt Report. There were 59 Lessons in total and a number of high and medium priority actions identified. Given the nature of the Fusion Implementation some of these recommendations are most pertinent for ICT System Implementations.

Organisational Capacity to run effective projects.

- 2.7** This theme was fairly wide ranging and considered both the capacity to learn from previous projects as well as well as putting quality assurance arrangements in place at project initiation stage and ensuring the Council's project management tools are fit for purpose.
- 2.8** There has been a specific requirement to undertake a lessons learnt review for the Oracle Fusion Implementation but it should be a standard approach at the conclusion of all projects to ensure the organisation is continually learning from its successes and failures.
- 2.9** It is essential to get things right the first time and key controls need to be established right from the outset at Project Initiation stage to enable this. This includes having the right input too, especially the engagement of the legal team in reviewing draft contracts.
- 2.10** The Council has an established project methodology in place through its Project Management Toolkit which has been in place for a number of years and whilst not considered inadequate it does merit a review in light of the lessons learnt review of Oracle Fusion especially for the inception stage of projects and ensuring there is a clear Quality Assurance methodology in place.

Project management methodologies and effective use of project tools

- 2.11** It appears that the high risk nature of the project was not sufficiently recognised at set up and initiation stage which meant that there was insufficient recognition of risks to be mitigated as well as identifying the resources required, specifically in house capacity and there were also insufficient strategies put in place at that time to keep the project on course.
- 2.12** As said above the Council's Project Management Toolkit should be reviewed but it is broadly fit for purpose and as important is its promotion to ensure greater awareness and effective use. A new software tool "Lessonflow" was trialled as part of this review and there is a good case for its continued use as the Council's project review approach.

Testing infrastructure and testing capability.

- 2.13** The Council was unprepared for the challenges in the Oracle Fusion implementation on two key fronts – insufficient experience and resource. This presented itself with greatest impact in system test, data migration and parallel running phases of the project. Alongside minimal project management resource at the outset there was a lack of understanding of the contribution that was required by the internal Finance, HR and Payroll Teams. Ultimately this was supplemented with external consultancy support at some cost. This failing also lay with the System Implementor; an experienced system implementor who had been engaged should have drawn attention to the resources required.
- 2.14** The system design was also flawed for absence management which caused difficulties throughout the project late into the implementation and certainly contributed to the repeated attempts at data migration and payroll parallel running.
- 2.15** Whilst this is possibly a more technical element of the review, it is essentially about ensuring the basics are in place. There needs to be adequate testing capability and a clear strategy for testing.

Effective project team planning.

- 2.16** Despite the resourcing issues raised in the previous theme there was an ongoing reliance in planning for the project on the existing Business as Usual teams, especially payroll. This caused significant issues at crunch times in the project when there were key operational tasks such as the monthly payroll to be attended to and whilst teams were working in a new environment given the challenges of the pandemic.
- 2.17** This can be largely addressed with the introduction of basic "capability and maturity management" arrangements to ensure more realistic expectations are in place in future projects.

Recommended actions/priority actions.

- 2.18** The full set of lessons and recommendations are set out in the appended report. However, the high priority ones are also set out below.

- 2.19** Theme 1 - Organisational Capacity to run effective projects.
- 2.20** Lesson 2 - Organisational learning approach with lesson management system required: Current Lessons learned capability only at low level.
- 2.21** Recommended Actions:
- i. Lesson learning capability should be introduced into Vale of Glamorgan ways of working with both business process and lessons learned tooling.
 - ii. Subject to satisfactory performance this should include Lesson Learning tooling within the Project Management Toolkit.
 - iii. This will enable lessons learned to be enacted through the organisation for the benefit of future projects.
 - iv. Lessons learned may be read across from executed projects to new projects at their inception to avoid repetition of errors, omissions & failures.
 - v. Capability and Maturity management should be adopted as a means of enacting and tracking the organisational learning approach to ensure it is realistically enacted. From the current low level of capability (CMM_1) there is a lot that can be done to improve the systematic capture, review and actioning of lessons learned to a minimum of CMM_2.
 - vi. Without these steps in a structured system the lessons learned process will deliver little value.
- 2.22** Lesson 9 - Insufficient attention to Quality and Strategy documentation.
- 2.23** Recommended Actions:
- i. Quality Management should be considered at the Project Initiation Stage and in the PID (Project Initiation Document) if the PRINCE2 methodology is employed and should be considered in any case irrespective of the methodology.
 - ii. A Quality Management document should describe the quality techniques and standards to be applied and the responsibilities for achieving the required quality levels.
 - iii. Quality documentation should also comply with CMM_2 (Capability and Maturity Model Integration) compliance at level 2 to ensure avoidance of error repetition in business processes.
- 2.24** Lesson 43 - Implementation Partner - Due Diligence
- 2.25** Recommended Actions:
- i. The tender response evaluation should include a Quality Assurance planning component in the PID (Project Implementation Document) to ensure that potential implementation partners are able to demonstrate that they have the technical ability/resource to deliver all technical requirements, including reference sites and third-party assurance.
- 2.26** Lesson 52 - Project Management Toolkit needs review & relaunch to support Project Control.

2.27 Recommended Actions:

- i. Review and relaunch Project Management toolkit in any event & in particular to address the inadequacies of the Oracle project initiation document set.
- ii. The review/relaunch should address a number of the recommendations herein made which should be called up from the updated business process and toolkit specification.

2.28 Lesson 53 - Introduce Project Planning approach & template(s) as part of the Project Management Toolkit for Project Manager callup to each new project

2.29 Recommended Actions

- i. Some basic investment and agreed use of Project Management tooling and approach should be made and specified as normally accepted ways of working - probably to be called up from the Project Management Toolkit.
- ii. Project Management plan templates should be generated and made available to be accessed by the PM of new projects. These should include high level general deliverables that will be common to most projects with their normal allocation of responsibility within the Council so that good practise is referenced from the outset. For example:
 - PID preparation with its respective strategy contributions.
 - Stage boundaries and what is normally expected in each stage.
 - The inclusion of the key deliverables from the deliverables register.
 - The inclusion at the agreed time of the Roles & Responsibilities listing including important supporting functions such as Legal, OD, Training & Comms with an agreement that their resources will be allocated and committed according to the Project Plan.

2.30 Theme 2 - Project management methodologies and effective use of project tools

2.31 Lesson 6 – No effective Project Management methodology until Project Reset

2.32 Recommended Actions:

- i. Project should not be approved to proceed unless & until the methodology by which it is to be managed is clearly specified and communicated.
- ii. Revision of the Council's project management toolkit to ensure that an appropriate Project management methodology is used to supported project start up and execution.
- iii. The action checklist and risk register for new projects should include a reference to project methodology to be used from the startup gate when a decision should be made. This should then be trained into the project team.
- iv. The methodology may be chosen to suit the project type and might be typically PRINCE2 or Agile.

2.33 Lesson 20 - Project Gateway control system required in Project Management

- 2.34** Recommended Actions:
- i. A Project Gateway control system should be introduced in Quality Management at stage boundaries. This should be included in the PID at the Initiation Stage.
- 2.35** Lesson 21 - No effective Risk Management approach in place prior to Project Reset
- 2.36** Recommended Actions:
- i. From the project initiation stage there should be specified and effective risk management techniques and standards applied and the responsibilities for achieving an effective risk management procedure.
Attention to Risk Management review at each stage gate is required with suitable independent appraisal.
- 2.37** Lesson 55 - Clear Contractual Scope of Works for Inclusion in Legal Documents (particularly contracts)
- 2.38** Recommended Actions:
- i. Closer involvement and clearer timescales for legal involvement in high-risk projects.
- 2.39** Lesson 56 – Management of Stage Boundaries to include reference to Legal Services if contractual obligations are not being achieved.
- 2.40** Recommended Actions:
- i. Closer involvement and clearer timescales for legal involvement in high-risk projects.
- 2.41** Lesson 59 – Fuller Engagement of Legal Services is required once a project is identified as high risk.
- 2.42** Recommended Actions:
- i. Ensure that Legal Services are fully engaged as part of any contractual discussions prior to any contract being agreed.
- 2.43** Theme 3 - Testing infrastructure and testing capability.
- 2.44** Lesson 7 - Testing capability & Infrastructure is essential.
- 2.45** Recommended Actions:
- i. Testing capability & Infrastructure is essential & should be introduced within BAU to support projects.
 - ii. The PM should be able to call up this basic capability from their PID & Project plan.
 - iii. Vale of Glamorgan needs an encompassing testing application that helps with all aspects of testing from test case management down to running tests. It then reports on all of this.
 - iv. This testing tool, infrastructure and in house capability should be enhanced by resource recruitment for individual projects as required with resource

recruited for and charged to the project - marked up if & as necessary to cover the cost of the infrastructure.

- v. The Implementor should then be asked to use the Vale test tool such that VOG has retention of the testing scripts & records.
- vi. As referenced to other lessons the Implementor would use the test tooling for Unit & System testing and the Vale tool for all testing which follows system acceptance, principally UAT & PPR.

2.46 Lesson 14 - Testing strategy, management toolkit and test & scripts repository

2.47 Recommended Actions:

- i. In conjunction with lesson 7, there should be introduced a testing strategy, management toolkit and test & scripts repository at the project start-up gateway.
- ii. For the ongoing quarterly testing of Oracle the test scripts should be brought forward into the chosen tooling where the test scripts have an ongoing value in manual and automated testing on future quarterly releases.
- iii. For other projects the Project Startup stage should identify whether it has a testing requirement that requires test facility provisioning.

2.48 Theme 4 - Effective project team planning

2.49 Lesson 33 - Selecting an Implementation Partner

2.50 Recommended Actions:

- i. A Project Manager (PM) should be appointed, in place and be an approval signatory to the PID in order to pass through the Project Initiation Gateway.
- ii. The PM should be qualified to support the Sponsor in the appointment of Implementation Partner.
- iii. The PM should be a subject matter expert in the substance of the Project In this case - right from the Project Initiation stage there should be a PM in place who has experience on a HCM/Finance/Payroll implementation.

2.51 Lesson 34 - Project Team

2.52 Recommended Actions

- i. Project Team requirements should be assessed at the Project Start Up & Initiation stages and included in the PID in order to be rigorously assessed.
- ii. A requirement identified to set up a project team from day 1 to work alongside normal staff. This was the process in place when we implemented EBS Oracle.
- iii. Future consideration should be given by the organisation as to whether there is the required capacity to undertake such projects, combined with everyday operational work.

2.53 Conclusions

2.54 Despite the challenges experienced in the delivery of the Implementation of Oracle Fusion the overall benefits of the business case have been delivered. The Council has a robust future proofed integrated HR and Finance Cloud based

system. Through Oracle there are quarterly patches/updates which the Council is signed up for which support this.

- 2.55 The Council has ultimately delivered a very high quality implementation and is currently collaborating with other local authorities to assist them to implement effectively and to take advantage of learning from elsewhere.
- 2.56 Longer term the Council will explore the benefits of rolling out further functionality in the system such as recruitment, scanning and the supplier portal.
- 2.57 The lessons learnt from this review will naturally be shared with the rest of the organisation and an action plan will be put in place to ensure that the actions are appropriately delivered, with reporting to the Council's Strategic Leadership Team.

3. How do proposals evidence the Five Ways of Working and contribute to our Well-being Objectives?

- 3.1 The proposals demonstrate the five ways of working in a number of ways. The report does not just seek to address the specific challenges that were experienced in the Oracle Fusion implementation. Instead, it is forward looking and seeks to capture learning from the project that can and should be applied to future Council initiatives and projects. Many of the recommendations are targeted at greater collaboration in projects, especially at the outset when a clear understanding of the risks and scope of the project are required. It will also help to ensure that some of the difficulties which arose during the project are less likely to be experienced in the future.

4. Climate Change and Nature Implications

- 4.1 No climate change and nature considerations.

5. Resources and Legal Considerations

Financial

- 5.1 There are no financial implications arising from this report. The financial details relating to the full cost of the programme are set out in the body of the report.

Employment

- 5.2 No employment considerations.

Legal (Including Equalities)

5.3 No are no direct legal considerations arising as a result of this report.

6. Background Papers

EP April 2022

https://www.valeofglamorgan.gov.uk/Documents/_Committee%20Reports/Council/2022/22-07-18/22-07-18-Use-of-CXs-Emergency-Powers.pdf

Cabinet Report September 2022

[Oracle Upgrade Update \(valeofglamorgan.gov.uk\)](#)

EP February 2023

https://www.valeofglamorgan.gov.uk/Documents/_Committee%20Reports/Cabinet/2023/23-03-16/Use-of-CX-Emergency-Powers-Report.pdf

Oracle Fusion Lessons Learnt Report

Vale of Glamorgan Council

**Capturing the Lessons, Insights and Key Reflections
from the Vale of Glamorgan Council's Oracle Fusion
Implementation Project**

**Report Authors: Tony Wilson, Rasha Ismail & James
Rees**

March 2024

1. Summary

1.1 This report seeks to capture the lessons, insights and key reflections from the Vale of Glamorgan Council's Oracle Fusion ERP (Enterprise Resource Platform) Implementation Project, which went live in April 2023 for Finance and HR services. The report provides a detailed breakdown and analysis of the following:

- Key Purpose of Lessons Learnt.
- Achievement of the Council's Objectives via the Project.
- Issues with Project leading to Project being Delivered Late and Over Budget.
- Undertaking of Lessons Learnt Activity
- What Went Well?
- What Did Not Go Well?
- How do we Improve for the Benefit of Future Projects
- What Further Comments are Valuable to the Learning Process
- Principal Lessons and Learning
- Next Steps for Enactment into future Council Projects

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| Tony Wilson | 0.2 | 27/11/23 | Additional review detail |
| Tony Wilson | 0.3 | 11/12/23 | Additional review detail |
| James Rees | 0.4 | 18/12/23 | Additional review detail |
| Tony Wilson | 0.5 | 22/12/23 | Additional review detail |
| James Rees | 0.6 | 29/12/23 | Additional review detail |
| James Rees | 1.0 | 05/01/24 | Amendments and formatting |
| James Rees | 1.01 | 19/02/24 | Additional formatting |
| Tony Wilson | 1.02 | 05/03/24 | Final amendments and formatting |

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The review team would like to express their thanks to all the document contributors that assisted with both the collation of lessons learned and the content of this document.

5. Key Purpose of Lessons Learnt

This report provides several key purposes – all of which intend to build upon the process by which the Council can add value as part of its project management process. The systematic collection of lessons is intended to support the understanding of both the successes and failings of the project.

The learnings contained within the report (and the process by which the lesson activity is gathered and worked through) represents a key tool for organisational learning, ensuring that valuable experiences contribute to the implementation of best practices and outcomes in future projects.

5.1 Knowledge Transfer

This Lessons Learned report and associated index of lessons serves as an information repository for knowledge transfer, ensuring that knowledge and experiences gained during the project implementation are captured and are capable of being transferred to other staff.

5.2 Improvement

The Lessons Learnt activity assists in identifying what worked well and what didn't work well during the project. The analyse of project successes and failures is provided to help future project teams replicate successes and avoid failures during future schemes. It represents a vital part of the Council's progression as a learning culture, aiming to improve future performance, not only for individuals but also for the organisation itself to develop.

5.3 Communication

Communication of Lessons activity throughout the organisation seeks to improve the ability for departments to improve upon their management of projects by learning from both the successes and failures of other projects and effectively implementing that learning into future planning communications.

5.4 Decision Management

Effective use of the analysis of lessons learned seeks to add to the organisation knowledge bank regarding effective decision making and project governance, enabling future projects to learn from successful implementation of effective decision-making frameworks.

6. Achievement of the Council’s Objectives

6.1 Objectives set out in the original proposal

6.1.1 The Council’s high level organisational objectives that lie at the heart of the project are commented in this report by the Sponsor(s):

- “lowering costs”, “reducing organisation-wide overhead”
- “Improving organisation-wide strategic decision making and governance”

6.1.2 The project management brief has been considered as “achieved” and as “delivering a future proofed” cloud-based ERP system for the council.

6.1.3 A breakdown of the high-level objectives is provided in the section below.

6.2 High-Level Objectives

6.2.1 The Council high level objectives as per business case are set out in tabular form below:

| | |
|---|--|
| 1 | Lowering costs with the introduction of a modern integrated system for Finance, HR, Payroll and Procurement |
| 2 | Reducing organisation-wide overhead with the introduction of new streamlined corporate policies and processes |
| 3 | Improving organisation-wide strategic decision-making and governance by improving data quality. Reporting and analytics capability |
| 4 | Delivering a future-proofed system |

6.3 Business Case Objectives

6.3.1 The full direct extract of objectives from the Business Case is provided below:

- The implementation of modernised back-office applications supporting Best Practice working processes.
- To enable and support modern working trends, to include agile / mobile working and real-time management information.
- To have the potential to consolidate a number of applications giving the user a better more joined up experience.
- To provide more efficient workflows and processes delivered through more functions being supported by the new platform; and
- To deliver a future-proofed platform with lower and much more predictable operating costs.

6.4 Key Business Benefits

6.4.1 The key business benefits to be achieved through this upgrade should be:

- Reduced future operating costs.
- Predictable future operating costs.
- Simplified workflows and processes & enhanced customer experience.
- Lowered staff training costs.
- Stronger internal control environment.
- Reduced reliance on traditional workforce facilities (desks, phones etc).
- Up-skilling of internal staff as a result of project knowledge transfer.
- Future possibilities for providing council to council support to other authorities/organisations on similar projects leading to the generation of potential income streams.

7. Issues with Project leading to Project being Delivered Late and Over Budget

7.1 Sponsors Summary

- 7.1.1 The Oracle Fusion implementation project, originally initiated in February 2021 and originally scheduled to go-live in January 2022, was finally made live in April 2023. The project has met the majority of its objectives but over a greater timescale and with significant additional cost.
- 7.1.2 It is always a challenge to establish a robust business case for the necessary replacement of an integrated financial system such as an Oracle ERP. The existing locally hosted “E-Business Suite” version of Oracle was out of support and not replacing it was an unacceptable risk for the Council due to the ERP system having responsibility for delivering the financial ledger, payroll, HR data, procurement, payments and data. The new Oracle Fusion is cloud based and is marginally more expensive to operate when the external system support costs are taken into accounts, and this additional cost was incorporated into the Council’s budget during 2023/24 budget setting.
- 7.1.3 Whilst the system is now live and functioning well and certainly having a better look and feel and being more intuitive to use than its predecessor, there is still unfinished work required to develop the system to support the Council’s core function. The Council has wisely done little or no tailoring to the system which will make quarterly patching and upgrades routine and relatively pain-free. However, there has been minimal redesign of the Council’s existing systems and processes and this is therefore work in progress. The financial reports for cost centre managers are not yet in place which would enable greater self-service for service managers and reduce the burden on the corporate Accountancy Team. Similarly, the processes around recruitment and making changes to the existing workforce are still driven by manual forms.
- 7.1.4 The system is robust from a governance perspective and provides sound assurance to the Council for its reporting and decision making. There was a comprehensive clean-up of existing data especially in respect of posts and ensuring these matched the financial system to provide robust information on the establishment. The Council has also effectively partnered with Oracle to help deliver greatly enhanced reporting of data to the Teachers Pensions agency.
- 7.1.5 The system is future proofed and with the take up of the quarterly patching on a largely non-tailored solution the system has the potential to serve the Council for a significant number of years.

- 7.1.6 Delivery of the first objective to lower costs has possibly been a contributor to the delays and eventual greater cost of implementation. The Council had attempted to undertake the implementation at the lowest possible cost and placed over reliance on the existing workforce in Finance and HR to work with the System Implementer to deliver Oracle Fusion. With the benefit of hindsight there was clearly insufficient capacity and system knowledge in these teams and there was also insufficient project management resource to effectively manage and guide the resource that was in place and to hold the system Implementer to account.
- 7.1.7 The lack of capacity impacted on the early stages of the project where there was insufficient engagement in initial system testing. This work was not properly completed and contributed to delays later in the project where there were numerous and protracted attempts to complete data migration. Whilst there is much credit to go to teams for the way in which they delivered services during the pandemic, the impact of the pandemic cannot go without mention. It was a disruptor to the project which was almost entirely delivered through remote working and would undoubtedly benefit from workplace collaboration as many of the challenges of such a project were worked through.
- 7.1.8 Issues relating to the project were raised at project sponsor handover in October 2021 when it became evident the project was not going to deliver in November 2021. Agreement was sought from the Council's Strategic Leadership Team (SLT) to replace the initially assigned Project Manager. The Council's Strategic Leadership team were also updated in February 2022 regarding the introduction of a reset of the project, including the introduction of a new Project Manager and additional project management support from the Council's Business Improvement Manager.

7.2 Financial Summary

- 7.2.1 Go-Live April 2023 was achieved as projected in November 2022 at a cost of £5.192M, a further delay of 5 months with further incremental cost in the range of £1.334M from the position reported to Cabinet in September 2022.
- 7.2.2 The table in figure 1. below sets out the updated implementation costs.

Fig.1 Updated Implementation Costs

| | Original | April Emergency Powers | Nov Go Live | April 2023 Go Live |
|---|-----------------|---------------------------------------|--------------------|-------------------------------|
| | £'000 | £'000 | £'000 | £'000 |
| Support and Implementation Budget | 1,200 | 1,513 | 1,563 | 1,600 |
| Additional Environments | 0 | 35 | 76 | 110 |
| Extension to support for existing Oracle modules due to implementation delay | 0 | 227 | 348 | 548 |
| Project Management and Additional Staff Support | 300 | 300 | 1,709 | 2,719 |
| Archiving | 0 | 100 | 100 | 117 |
| External Training Support | 0 | 0 | 62 | 72 |
| Contingency | 0 | 0 | 0 | 100 |
| Total Implementation Costs | 1,500 | 2,175 | 3,858 | 5,192 |

- 7.2.3 There were a series of reports to Cabinet on the progress of the project which are detailed below and provided a full update on the increased costs to deliver the new system as well as identifying and seeking approval for additional resources. These additional resources were use of a specific earmarked reserve and underspends in the Council's Policy Budget.
- 7.2.4 The April 2022 Emergency Powers report covered the additional internal resource required including project management as well as the need to continue the licencing of the existing EBS system with a revised Go Live of August 2022.

- 7.2.5 There was a subsequent Cabinet report in September 2002 and further Emergency Powers report in January 2022 extending the Go Live to April 2023 when the system did eventually Go Live. This gave rise to extensive backfilling of Vale of Glamorgan teams, especially payroll and further system implementation costs and dual running of Oracle EBS costs.

7.3 Legal Summary

- 7.3.1 Where a particular project meets certain parameters or conditions (value/complexity/risk) consideration for legal involvement at the procurement/pre-contract/project planning stage and in particular when the project scope is being considered, there will be a dependence on the expertise of the project lead to qualify what the possible risks look like in agreeing to certain provisions to ensure the most effective legal advice. At the lessons learned stage of reviewing this project it is evident that its appropriate classification was high value/complexity/risk from the outset in January 2021.
- 7.3.2 Where a project timeline is being exceeded and/or overspent more than what is provided for in the contractual provisions, escalation to Legal Services at the point this arises is required. This can be achieved by a standard Project Board agenda item to consider 'contractual considerations'. It is evident that this point was recognised in the project around July 2022 when Legal Services were re-engaged.
- 7.3.3 In consideration of the above, any change/event which goes to the heart of the contract, e.g. a change in project scope requires consideration for legal involvement at an early stage.

- 7.3.4 At the outset of the project, Legal Services were engaged to finalise the contract documentation on the 5th of January 2021. The instruction requested consideration of the contract and sign off for commencement of the contract on the 11th of January 2021. The Council had appointed a Systems Integrator to assist with the process of moving from the Oracle R12 hosted solution to Oracle Cloud, with project go-live by November 2021. The then current Oracle system was on a version which was no longer to be supported by Oracle after December 2021 and a replacement solution was being sought.
- 7.3.5 Following completion of the Contract, Legal Services were then not engaged with the project until July 2022 apart from routine Change Requests. At this point the referral was made on the basis of problems going to the heart of the project which presented contractual challenges.
- 7.3.6 A request was made for advice in July/August 2022 on the interpretation/clarification of certain clauses contained within the contract documentation. The request for legal advice was raised at project team and requested by the project team. In August/September 2022 the project sponsors expressed concerns and issues were again raised at Senior Leadership Team. A Cabinet report was then prepared with contribution by Legal Services. Due to complexity and the technical nature of the advice required external specialist legal advice was also sought given the value of the contract. At this point it had become evident that there were significant concerns regarding scope management, escalation costs, delays and reputational damage. An initial meeting took place with external lawyers instructed before the December 2022, with meetings with internal clients, representative of HR/Payroll/Finance and the Project Team lead.
- 7.3.7 Initial advice was received in February 2023 and the Council's position set out in a formal letter to Evosys/Mastek. Further communications were exchanged and resolution was achieved.

7.4 Previous Reports to Cabinet

- 7.4.1 There have been a series of Cabinet Reports (two Emergency Powers reports in April 2022 and January 2023 and a report to the meeting of 29 September 2023) providing an update on the financial position of the project and regarding the securing of the additional resources to cover the increased costs.
- 7.4.2 **Emergency Powers April 2022** - there had already been a reset of the project from the original planned Go Live of November 2021 to April 2022. Additional resource had been brought in to project manage the delivery of the new system and this had led to a further reappraisal of timelines and internal resourcing required. The planned Go-Live was pushed back to August 2022 and as well as the additional internal resourcing costs of £348K, there was also a further £227K of additional Oracle EBS running costs due to the delay.

- 7.4.3 **Cabinet September 2022** – across spring/early summer 2023 the project experienced challenges on a number of fronts, including User Accepting Testing, Data Migration and Payroll Planning in part due to the necessary groundwork not having been comprehensively completed in early stages of the project. Also, an essential element of the system for reporting to the Teacher Pensions Agency had not been fully developed. There was a comprehensive reappraisal of timelines and costs with a revised November 2022 Go-Live projected and the overall implementation cost was increased to £3.858M.
- 7.4.4 **Emergency Powers January 2023** – The November 2022 Go-Live had been considered possible and a number of options were considered but due to challenges of processing payroll across the period and running into year-end it was decided to reschedule Go-Live for April 2023. The further £1.426M was met from the Council’s Policy Budget.

8. Undertaking of Lessons Learnt Activity

8.1 Lessons Learnt Review Process

- 8.1.1 During September and October 2023, the Council's Business Improvement Team and the former Oracle Fusion Project Manager led a systematic review of lessons learned in order to identify key successes and failings in order to identify areas of improvement that could be utilised when managing future projects. A wide variety of project stakeholders were interviewed and invited to contribute to the formation of a lessons learnt library, gathering insights and experiences from various project phases, including successes, challenges, and failures.
- 8.1.2 The recording of lessons learned in a systematic manner was performed via the use of a Lesson Learned database tool, for the purpose of detailing what worked well, what did not and the reasons why. This included the capturing of best practices, areas for improvement, and potential risks.
- 8.1.3 Review and analysis of the documented lessons was completed to extract actionable insights and derive meaningful conclusions, for the purpose of identifying patterns or recurring issues across projects. Lessons were sorted into categories and themes for easier reference and retrieval.
- 8.1.4 Distribution of the lessons learned was provided to relevant stakeholders and senior managers, with the intention of ensuring that collective thinking regarding the positive benefit of implementing improvements and best practices in future projects to prevent similar mistakes and enhance project outcomes.
- 8.1.5 Feedback from these sessions was positive and there was strong recognition and encouragement for the further development of a culture of continuous learning and improvement by the incorporation of feedback from lessons learned into the future design of organisational processes and methodologies.
- 8.1.6 These activities seek to foster a culture of learning, minimise risks, improve project efficiency, and enhance overall organisational performance based on past experiences and insights gained from completed projects.

9. What Went Well?

9.1 Key Achievement and Successes

- 9.1.1 The new Oracle Cloud ERP (Enterprise Resource Platform) has been implemented within the Vale of Glamorgan and enables Finance and HR to manage day to day activity. The legacy Oracle R12 system has been retired from live running albeit is still being used for archiving pending the completion of that separate project, currently scheduled for February 2024. The implementation of a cloud-based ERP provides for a future proofed system capable of receiving quarterly updates.
- 9.1.2 The Council has been equipped to maintain a fully up to date system with quarterly software updates from Oracle.
- 9.1.3 All key personnel have been trained in the operation of the new system and ways of working including user self-service.
- 9.1.4 User self-service functionality, supporting back-office systems and business processes have been successfully introduced which permits the ongoing transformation of ways of working. The new system is accessible for whole workforce use going forwards which permits continuing digital transformation.
- 9.1.5 User self-service has been successfully enacted into updated ways of working on the new systems.
- 9.1.6 Implementation of the new system has opened up the potential for achievement of the targeted key business benefits as per the Business Case.
- 9.1.7 The employee expenses system has been updated to a new and more standardised way of working with User self-service and reimbursement of expenses separated from payroll.
- 9.1.8 Schools and other non-corporate users were brought on board as user access was opened up beyond the very limited access permitted by policy and functionality of the old e-business suite system.
- 9.1.9 Good interaction was achieved with Organisation Development and Communications Functions as the Project progressed which had not been allowed for in original project design.

10. What Did Not Go Well?

10.1 Review of key issues and areas for improvement

10.1.1 A total of four cross cutting themes have been identified for effective lesson learning when identifying key issues and areas for improvement:

1. Organisational Capability to run effective projects
2. Project Management methodologies and effective use of project tools
3. Testing Infrastructure and Testing Capability
4. Project Team Planning

10.2 Theme 1 - Organisational Capability to run effective projects

10.2.1 There was a failure to appoint a suitably qualified Project Manager in a timely fashion such that the lack of expertise on Council Management caused the failure to recognise the extent of Council exposure and risk.

10.2.2 Further, the engagement of Legal Department was inadequate from the outset because of the incorrect risk assessment. This particularly applied to the inadequate engagement of Legal Department in draft contractual review and their lack of representation at the Project Steering Committee.

10.3 Theme 2 - Project Management methodologies and effective use of project tools

10.3.1 There is little evidence that the project was correctly categorised as a high-risk revenue project during project start-up and initiation phases and so the call up from the project management toolkit was incorrect from the outset. The failure to recognise the high-risk nature of the project led to inadequate consideration of risks to be mitigated, resources to be engaged/trained and methodology/strategies to be deployed to keep the project on track.

10.3.2 Thereafter the Council's Project Management toolkit was not followed with due care and attention in the project life up to the project reset in December 2021. The result was that the project was in reality failed at this point and in effect "reset" largely meant restart from system test onwards, however the main contractual failure of system test responsibility being with the Council could not be overcome.

10.3.3 The incoming Project Manager was not aware of the Project Management Toolkit at this time but followed good practice in project management such that the Council took correct courses of action in the circumstances, adopting a waterfall approach to Project Management to enable a corrective reset.

10.4 Theme 3 - Testing infrastructure and Testing capability effectiveness

- 10.4.1 In particular, the Council was unprepared in terms of experience and resource for the challenges posed by the project as contracted, particularly in relation to system test and data migration. A lack of internal project management resource can be identified as a key failing of the project. In addition, there was a significant lack of internal consultation regarding the potential resource impact upon the Finance, HR and Payroll teams in terms of their ability to contribute their time to the completion of the project whilst still delivering the day to day “business as usual” functions required of those services.
- 10.4.2 For whatever reasons the System Implementor did not draw the Council’s attention to the enormity of the Council’s exposures in this matter. The future good conduct of the project and problematic working arrangements should have caused the Implementor’s Programme and Project Manager to alert the Council and check that it really did want to proceed on this basis rather than accept a cost increase for the Implementor to assume this effort and risk for which it was much better prepared and which would have been much more conducive to the good conduct of the project.
- 10.4.3 The hidden failure in the Implementor’s system design was for absence management which went to the heart of the system build causing it to be fundamentally flawed so as to pose continuing payroll data reconciliation problems in all testing cycles. It became impossible to adequately reconcile payroll data between the old and new systems.
- 10.4.4 These matters came to a head in the contractual dispute with the Implementor over who should bear the costs for the resulting overrun as to time and cost.
- 10.4.5 Resolution was only possible by the Council adopting the recourse to contractual dispute and legal measures.

10.5 Theme 4 – Project Team Planning

- 10.5.1 The Council’s approach to project team planning and its reliance on use of the existing “Business As Usual” (BAU) resource caused significant issues with the running and maintenance of operational tasks as key resources were drawn in to the project at crunch times without the necessary back filling of operational teams.

11. How do we Improve for the Benefit of Future Projects?

11.1 Embedding best practice into future projects

- 11.1.1 Projects are the typical way in which change is introduced to the Council. The introduction of projects lead to a natural, incremental approach to organisational change.
- 11.1.2 The common thread to the success of this incremental approach is that the cross functional management of change via the introduction of projects within the Council which must receive more consistent management attention in a controlled environment.
- 11.1.3 As part of the Lesson Learned process to enable the embedding of best practice into future projects, key lessons have been identified, reviewed, approved, themed and prioritised. High priority lessons, as set out at appendix 1, are ready and recommended for immediate enactment to improve process capability and maturity in a measurable way. Other lessons are recommended for enactment when they fit in with those of high priority.
- 11.1.4 The introduction of the high priority recommendations will achieve the requisite consistent change management in project management behaviours.
- 11.1.5 As identified above, a total of four cross cutting themes have been identified for effective lesson enactment:
 - 1. Develop organisational capability to enact lessons.
 - 2. Make Project Management methodologies and tools effective.
 - 3. Make testing infrastructure and capability effective.
 - 4. Make project team planning effective.
- 11.1.6 The principal lessons, learnings and recommendations have been set out at appendix 1 and should be enacted to prevent repetition of the identified lessons.
- 11.1.7 The full set of lessons learned are ready for introduction into the Council business processes, as set out by theme in the appendices to this report (Appendix 2). These are organised under the dimensions of project phase, functional leadership and lesson category to assist in their enactment. This will have best cost/benefit ratio by being applied project by project as it permeates organisational behaviour.

11.2 Theme 1 - Develop organisational capability to enact lessons.

- 11.2.1 An auditable externally recognised framework should be introduced to measure progress. The recommendation is CMMI (Capability and Maturity Management Integration) which is also a cost management and reduction approach to get things right first time and repeatably.
- 11.2.2 Key controls, particularly at project inception, start-up and initiation should be formally introduced to enact the lesson learning activity. Stage gate management should be a new technique to be applied within the Project Management toolkit.

11.3 Theme 2 - Make Project Management methodologies, controls and tools effective.

- 11.3.1 Business and Project processes will be updated to give enhanced importance to the Project Management toolkit. This will be enacted as the highest priority as it drives a number of other high priority lessons.
- 11.3.2 Future projects will benefit from the “cross-cutting” application of lessons learned within the controlled environment achieved by the introduction of these new arrangements.
- 11.3.3 The Project Management Toolkit with its various tools should be used to enact and support the lessons learned.
- 11.3.4 Lessons learned should be cross fed into consideration of the risk register at the start up and initiation stages under these proposals via the Lessonflow tool usage.
- 11.3.5 A new software tool “Lessonflow” has been trialled and is recommended to support lesson enactment for new projects to be introduced into the Project Management toolkit whereby lessons learned from the Oracle project will be fed across to the inception of future projects.
- 11.3.6 Effective change management is multi-functional and will only be achieved by the introduction of new control techniques that implemented on an organisational wide basis for the support and development of future projects.
- 11.3.7 In additional, it is recommended that a control technique of regular review with an external element is introduced to monitor progress of lessons application.
- 11.3.8 Introduction of a formal quality board is recommended to assist with the effective staging of high-risk projects and programmes.

11.4 Theme 3 - Make testing infrastructure and capability effective.

- 11.4.1 Looking forward to future projects, the council requires an adequate testing capability and infrastructure.
- 11.4.2 A Testing Strategy, include a test tooling and test script repository is required within normal operations to be accessed at the project start-up gateway with training to be provided to testers wherever a project requires testing activity above an agreed threshold.

11.5 Theme 4 - Make project team planning effective.

- 11.5.1 The introduction of “capability and maturity management” within the organisation will develop the intended progression of organisational capability to learn from and apply these project lessons in a structured way.
- 11.5.2 With the application of these measures it will be possible to assess future projects in flight against a set of objective criteria.

12. What are our Principal Lessons and Learnings

12.1 Review of Key Lessons by Theme

- 12.1.1 High priority lessons have been identified by the Review team as being key to the development of a more matured approach to change management.
- 12.1.2 The section below provides an analysis of those high priority lessons by theme and the recommended remedial action identified to enable improvement:
- Theme 1 - Develop organisational capability to enact lessons.
 - Theme 2 - Make Project Management methodologies, controls and tools effective.
 - Theme 3 - Make testing infrastructure and capability effective.
 - Theme 4 - Make project team planning effective.

12.2 Lesson Theme 1 - Develop Organisational Capability to Enact Lessons

- 12.2.1 A key theme developed from the lessons learned activity for the council was the need to develop organisational capability and capacity to enable lessons to be successfully enacted.
- 12.2.2 Organisational Development of project management capability and capacity requires improvement, suggesting the introduction of structured lesson learning capabilities in working practices and tools. This includes integrating lesson learning tools into the Project Management Toolkit to enable sharing lessons across projects, preventing past errors, and enhancing capability and maturity management for better implementation.
- 12.2.3 The requirement for attention to Quality Management during project initiation having been identified suggests the inclusion of Quality Management in the Project Initiation Document (PID), regardless of the methodology used. This involves defining quality techniques, standards, and responsibilities, aiming for compliance with Capability Maturity Model Level 2 (CMM_2) to prevent recurring errors in business processes.
- 12.2.4 A recommendation for the inclusion of a Quality Assurance component in the Project Initiation phase for partner evaluation was also identified. This will ensure potential implementation partners have the technical capabilities and resources required, including reference sites and third-party assurance.
- 12.2.5 A proposed review and relaunch of the Project Management Toolkit, specifically addressing inadequacies in the project initiation document set used for the initiation of the Fusion project. The review should incorporate recommendations from updated business processes and toolkit specifications.

| Ref | Lesson Title | Phase(s) | Recommended Action |
|-----|---|--------------------|--|
| L2 | Organisational learning approach with lesson management system required: Current Lessons learned capability only at low level | Project Initiation | <ul style="list-style-type: none"> • Lesson learning capability should be introduced into VoG ways of working with both business process and lessons learned tooling. • Subject to satisfactory performance this should include Lesson Learning tooling within the Project Management Toolkit. • This will enable lessons learned to be enacted through the organisation for the benefit of future projects. • Lessons learned may be read across from executed projects to new projects at their inception to avoid repetition of errors, omissions & failures. • Capability and Maturity management should be adopted as a means of enacting and tracking the organisational learning approach to ensure it is realistically enacted. From the current low level of capability (CMM_1) there is a lot that can be done to improve the systematic capture, review and actioning of lessons learned to a minimum of CMM Level 2 (CMM_2). • Without these steps in a structured system the lessons learned process will deliver little value. |

| Ref | Lesson Title | Phase(s) | Recommended Action |
|-----|---|--------------------|--|
| L9 | Insufficient attention to Quality and Strategy documentation. | Project Initiation | <ul style="list-style-type: none"> • Quality Management should be considered at the Project Initiation Stage and in the PID (Project Initiation Document) if the PRINCE2 methodology is employed and should be considered in any case irrespective of the methodology. • A Quality Management document should describe the quality techniques and standards to be applied and the responsibilities for achieving the required quality levels. • Quality documentation should also comply with CMM_2 (Capability and Maturity Model Integration) compliance at level 2 to ensure avoidance of error repetition in business processes. |

| Ref | Lesson Title | Phase(s) | Recommended Action |
|------------|--|-----------------------------|--|
| L43 | Implementation Partner - Due Diligence | Startup, Project Initiation | <ul style="list-style-type: none"> The tender response evaluation should include a Quality Assurance planning component in the PID (Project Implementation Document) to ensure that potential implementation partners are able to demonstrate that they have the technical ability/resource to actually deliver all technical requirements, including reference sites and third-party assurance. |

| Ref | Lesson Title | Phase(s) | Recommended Action |
|------------|---|--------------------|--|
| L52 | Project Management Toolkit needs review & relaunch to support Project Control | Project Initiation | <ul style="list-style-type: none"> Review and relaunch Project Management toolkit in any event & in particular to address the inadequacies of the Oracle project initiation document set. The review/relaunch should address a number of the recommendations herein made which should be called up from the updated business process and toolkit specification |

| Ref | Lesson Title | Phase(s) | Recommended Action |
|-----|--|--------------------|--|
| L53 | Introduce Project Planning approach & template(s) as part of the Project Management Toolkit for Project Manager callup to each new project | Project Initiation | <ul style="list-style-type: none"> • Some basic investment and agreed use of Project Management tooling and approach should be made and specified as normally accepted ways of working - probably to be called up from the Project Management Toolkit. • Project Management plan templates should be generated and made available to be accessed by the PM of new projects. These should include high level general deliverables that will be common to most projects with their normal allocation of responsibility within the Council so that good practise is referenced from the outset. For example: <ul style="list-style-type: none"> • PID preparation with its respective strategy contributions. • Stage boundaries and what is normally expected in each stage. • The inclusion of the key deliverables from the deliverables register. • The inclusion at the agreed time of the Roles & Responsibilities listing including important supporting functions such as Legal,HR, OD, Training & Comms with an agreement that their resources will be allocated and committed according to the Project Plan. |

12.3 Theme 2 - Make Project Management methodologies, controls and tools effective

- 12.3.1 Lessons Learned activity emphasised the necessity for a clearly defined and communicated Project Management methodology before approving project progression. This includes revising the project management toolkit to ensure it supports the project's start-up and execution, including references to the chosen methodology in project documentation and training the project team accordingly.
- 12.3.2 Recommendation of the implementation of a Project Gateway control system within Quality Management at stage boundaries. This system should be integrated into the Project Initiation Document (PID) during the initiation stage.
- 12.3.3 Importance of establishing an effective Risk Management approach right from the project initiation stage. This involves defining specific risk management techniques, standards, and responsibilities, alongside regular risk management reviews at each stage gate, including independent appraisal for suitability. The introduction of a Quality Board is an approach that should be considered to achieve an effective risk management approach for projects.
- 12.3.4 Legal controls identified as high priority under Theme 2 included the need for greater clarity regarding contractual scope of Works for Inclusion in Legal Documents, effective management of Stage Boundaries to included reference to Legal Services if contractual obligations are not being achieved and the need for fuller engagement of Legal Services once a project is identified as high risk.
- 12.3.5 High priority lessons identified within this theme are identified in the table below:

| Ref | Lesson Title | Phase(s) | Recommended Action |
|-----|---|---|---|
| L6 | No effective Project Management methodology until Project Reset | Start-up, Project Initiation, Project Reset | <ul style="list-style-type: none"> • Project should not be approved to proceed unless & until the methodology by which it is to be managed is clearly specified and communicated. • Revision of the Council's project management toolkit to ensure that an appropriate Project management methodology is used to supported project start up and execution. • The action checklist and risk register for new projects should include a reference to project methodology to be used from the start-up gate when a decision should be made. This should then be trained into the project team. • The methodology may be chosen to suit the project type and might be typically PRINCE2 or Agile. |

| Ref | Lesson Title | Phase(s) | Recommended Action |
|-----|---|--|--|
| L20 | Project Gateway control system required in Project Management | Project Initiation / Manage Stage boundaries | <ul style="list-style-type: none"> • A Project Gateway control system should be introduced in Quality Management at stage boundaries. This should be included in the PID at the Initiation Stage. |

| Ref | Lesson Title | Phase(s) | Recommended Action |
|-----|---|--|---|
| L21 | No effective Risk Management approach in place prior to Project Reset | Project Initiation / Manage Stage boundaries | <ul style="list-style-type: none"> • From the project initiation stage there should be specified and effective risk management techniques and standards applied and the responsibilities for achieving an effective risk management procedure. Attention to Risk Management review at each stage gate is required with suitable independent appraisal. |

| Ref | Lesson Title | Phase(s) | Recommended Action |
|-----|--|--|--|
| L55 | Clear Contractual Scope of Works for Inclusion in Legal Documents (particularly contracts) | Project Initiation / Manage Stage boundaries | <ul style="list-style-type: none"> • Closer involvement and clearer timescales for legal involvement in high-risk projects. |

| Ref | Lesson Title | Phase(s) | Recommended Action |
|------------|--|--|--|
| L56 | Management of Stage Boundaries to include reference to Legal Services if contractual obligations are not being achieved. | Project Initiation / Manage Stage boundaries | <ul style="list-style-type: none"> • Consideration of Legal Services involvement at Quality Board |

| Ref | Lesson Title | Phase(s) | Recommended Action |
|------------|--|--|---|
| L59 | Fuller Engagement of Legal Services is required once a project is identified as high risk. | Project Initiation / Manage Product Delivery | <ul style="list-style-type: none"> • Ensure that Legal Services are fully engaged as part of any contractual discussions prior to any contract being agreed. |

12.4 Theme 3 - Make testing infrastructure and capability effective

12.4.1 Lessons Learnt relating to the testing quality highlighted the essential nature of testing capability and infrastructure across different project phases. It suggests integrating testing capability into Business-As-Usual (BAU) operations to support projects. The Project Manager (PM) should be able to access this capability from the Project Initiation Document (PID) and plan. The council requires a comprehensive testing application that manages test cases, conducts tests, and generates reports. This tool, infrastructure, and in-house capability should be enhanced through project-specific resource recruitment where required.

12.4.2 It is also recommended that the organisation introduces a testing strategy, management toolkit, and test & scripts repository during the project start-up gateway. For ongoing Oracle quarterly testing, scripts should be transferred into chosen tooling for continuous value in manual and automated testing. Other projects during the start-up stage should make a value-based assessment on the level of required testing facilities provision.

| Ref | Lesson Title | Phase(s) | Recommended Action |
|-----|--|---|--|
| L7 | Testing capability & Infrastructure is essential | Project Initiation, Manage Product delivery | <ul style="list-style-type: none"> • Testing capability & Infrastructure is essential & should be introduced within BAU to support projects. • The PM should be able to call up this basic capability from his PID & Project plan. • Vale of Glamorgan needs an encompassing testing application that helps with all aspects of testing from test case management down to running tests. It then reports on all of this. • This testing tool, infrastructure and in house capability should be enhanced by resource recruitment for individual projects as required with resource recruited for and charged to the project - marked up as necessary to cover the cost of the infrastructure. • The Implementor should then be asked to use the VOG test tool such that VOG has retention of the testing scripts & records. • As referenced to other lessons the Implementor would use the test tooling for Unit & System testing and VOG for all testing which follows system acceptance, principally UAT & PPR. |

| Ref | Lesson Title | Phase(s) | Recommended Action |
|-----|--|--|--|
| L14 | Testing strategy, management toolkit and test & scripts repository | Startup, Project Initiation, Manage Product delivery | <ul style="list-style-type: none"> • In conjunction with lesson 7, there should be introduced a testing strategy, management toolkit and test & scripts repository at the project start-up gateway. • For the ongoing quarterly testing of Oracle the test scripts should be brought forward into the chosen tooling where the test scripts have an ongoing value in manual and automated testing on future quarterly releases. • For other projects the Project Startup stage should identify whether it has a testing requirement that requires test facility provisioning. |

12.5 Theme 4 - Make project team planning effective

12.5.3 Analysis of Lessons Learnt during the project sheds light on the importance of having a Project Manager (PM) appointed and involved early in the Project Initiation phase. The PM should possess the necessary qualifications to aid the Sponsor in selecting an Implementation Partner. Furthermore, they should be well-versed in the project's subject matter, in this case, having experience in HCM/Finance/Payroll implementations right from the Project Initiation stage.

12.5.4 In addition, there is a required need for a thorough assessment of the Project Team requirements during the Project Start-Up and Initiation stages, emphasizing their inclusion in the Project Initiation Document (PID) for thorough evaluation. It is suggested that a full project team from the project's outset would have been appropriate to enable distinction from the council's Business as Usual (BAU) team, similar to the process used during the council's original EBS Oracle implementation. Future organisational considerations should focus on evaluating if there exists sufficient capacity to handle such projects alongside regular operational work.

| Ref | Lesson Title | Phase(s) | Recommended Action |
|-----|-------------------------------------|--------------------|--|
| L33 | Selecting an Implementation Partner | Project Initiation | <ul style="list-style-type: none"> • A Project Manager (PM) should be appointed, in place and be an approval signatory to the PID in order to pass through the Project Initiation Gateway. • The PM should be qualified to support the Sponsor in the appointment of Implementation Partner. • The PM should be a subject matter expert in the substance of the Project In this case – from commencement of the Project Initiation stage there should be a PM in place who has experience on a HCM/Finance/Payroll implementation |

| Ref | Lesson Title | Phase(s) | Recommended Action |
|-----|--------------|----------|---|
| L34 | Project Team | Startup | <ul style="list-style-type: none"> • Project Team requirements should be assessed at the Project Start Up & Initiation stages and included in the PID in order to be rigorously assessed. • A requirement identified to set up a project team from day 1 to work alongside the regular staff team. This was the process in place when Vale of Glamorgan Council implemented EBS Oracle. • Future consideration should be given by the organisation as to whether there is the required capacity to undertake such projects, combined with everyday operational work. |

12.6 Summary of all other Lessons Identified

12.6.1 A summary of the other (designated as medium) priority lessons and the recommended associated action is outlined below. The full lesson learning and recommended action are detailed in Appendix 2 at the end of this document.

Theme 1 - Develop Organisational Capability to Enact Lessons

12.6.2 A key lesson within this within was the importance of ensuring Legal representation at Board Level. Ensuring that Legal Department is immediately engaged at Steering group level from the outset of project initiation. Whenever a project with an external purchase contractual element is rated as high risk it should have a legal department representation at Board level for the high-risk period.

Theme 2 - Make Project Management methodologies, controls and tools effective

12.6.3 A variety of lessons were identified under this theme, recognising the importance of the use of Project Management methodologies, controls and tools to ensure effective project design and control. Key lessons learned included essential learnings regard project planning and stakeholder engagement, essential cost and budget management learning and the importance of clear routes for enhanced risk assessment. Clarity regarding roles and resource dependencies and the use of clear and effective communication of project goals and timelines. Lessons were also learnt from the ability to manage projects remotely and the impact of the Covid-19 pandemic on overwhelming planning assumptions, affective strategies in 2021 and extending into 2022.

Theme 3 - Make testing infrastructure and capability effective

12.6.4 Several key issues in the project were captured under this theme. The contracting of system testing to the council, led to issues and complications that affected the project's progress and outcomes. Lack of adequate unit testing resulted in potential shortcomings and vulnerabilities within the system. The project also required multiple iterations of payroll parallel running, indicating significant challenges and setbacks in getting the payroll system fully operational. These lessons underscore the importance of thorough testing at every stage, clear contractual agreements, and robust system design and implementation to avoid critical setbacks and ensure project success.

Theme 4 - Make project team planning effective

12.6.5 Lessons learnt categorised under this theme included the timely appointment of a Qualified Project Manager to ensure effective project leadership and direction from the outset. Conduction of a thorough Training Needs Analysis during the project initiation stage is regarded as essential to address skill gaps and ensure the team has the necessary expertise.

- 12.6.6 Realistic assessment of Project Team requirements including the assessment of the requirements of the project team to ensure that the team composition aligns with the project's scope and demands. Basic Project Management Accreditation for key project actors to enhance understanding and alignment with project management principles, contributing to smoother project execution. Peer review of critical points proved beneficial, indicating the importance of collaborative feedback and insights for enhancing project quality. Clearly defined Non-Corporate and Third-Party System Access Requirements and addressing access requirements for non-corporate entities and third parties to systems is considered crucial for security and smooth project operations. A focus on execution and implementation plans for client group access to systems ensures a seamless user experience. Conducting a comprehensive stakeholder analysis is essential for effective communication strategies, ensuring that information reaches the right people at the right time.
- 12.6.7 These lessons emphasize the significance of early planning, skill assessment, effective communication, and secure access management for successful project execution and management.

13. Next Steps for Enactment into Future Council Projects

13.1 Lesson Enactment

Lesson enactment needs to be on an incremental basis project by project with each project taken through the process. The Lessons learning approach needs to be embedded into the project management toolkit to enable learning from this and other major projects moving forward.

13.1.1 Consideration of the Lesson priority is key. Theme 1 lessons open up the concept of lessons learnt into the development of the organisation. Theme 1 lessons must be implemented first to open up the organisation's capability to manage successful projects.

13.1.2 The Project Management Toolkit should be updated within the framework of capability and maturity management. This should include the use of Lessons Learned tooling for the benefit of future projects.

13.2 High Priority Lessons Actions

13.2.1 Lesson learning capability should be introduced into Vale of Glamorgan ways of working with both business process and lessons learned tooling. Subject to satisfactory performance this should include the use of Lessons Learned tooling within the Project Management Toolkit. This will enable lessons learned to be enacted through the organisation for the benefit of future projects. Lessons learned may be read across from executed projects to new projects at their inception to avoid repetition of errors, omissions & failures.

13.2.2 Capability and Maturity management should be adopted as a means of enacting and tracking the organisational learning approach to ensure it is realistically enacted. From the current low level of capability (CMM_1) there is a lot that can be done to improve the systematic capture, review and actioning of lessons learned to a minimum of CMM_2.

13.2.3 Without these steps in a structured system the lessons learned process will deliver little value.

13.3 Medium Priority Lessons Actions

13.3.1 Lesson enactment of medium priority lessons needs to be on an incremental basis project by project. This will require the medium priority actions to be pulled up into projects via the implementation of the high priority actions.

13.4 Next Steps

13.4.1 Authorisation of this approach by the Council and the development of CMM capability to enable the development of a systematic approach to project management.

13.4.2 An update and relaunch of the Council's project management tool kit is required, including the use of both waterfall and agile methodologies.

13.4.3 Key project actors to be trained in the use of the project management toolkit and be provided appropriate project management training depending on their role within projects.

14. Appendix 1 - High priority lessons with recommendations

Theme 1 - Develop Organisational Capability to Enact Lessons

| Lesson No | Lesson Title | Learning | Phase | Theme | Recommended Action |
|-----------|---|---|--------------------|---|---|
| 2 | Organisational learning approach with lesson management system required: Current Lessons learned capability only at low level | <p>Council needs to build in new organisational learning & tooling to avoid serious error repetition - namely CMM - Capability and Maturity Management in projects and BAU to avoid the repetition of the same organisational errors and to encourage the optimisation of process improvement.</p> <p>There is no VoG Organisation component, methodology or software to draw upon or reference in the nature of organisational learning in capability and maturity to ensure that project lessons learned are built in to VoG ways of working. With an increasing amount of project work to execute change within the organisation specific steps need to be taken to avoid repetition of errors in business process.</p> <p>Lessonflow tooling has been identified & introduced on a pilot basis for this project to move VoG to level #2 of CMM.</p> | Project Initiation | Theme 1 - Develop organisational capability to enact lessons. | <p>2.1 Lesson learning capability should be introduced into VoG ways of working with both business process and lessons learned tooling.</p> <p>2.2 Subject to satisfactory performance this should include Lessonflow tooling within the Project Management Toolkit.</p> <p>2.3 This will enable lessons learned to be enacted through the organisation for the benefit of future projects.</p> <p>2.4 Lessons learned may be read across from executed projects to new projects at their inception to avoid repetition of errors, omissions & failures.</p> <p>2.5 Capability and Maturity management should be adopted as a means of enacting and tracking the organisational learning approach to ensure it is realistically enacted. From the current low level of capability (CMM_1)there is a lot that can be done to improve the systematic capture, review and actioning of lessons learned to a minimum of CMM_2.</p> <p>2.6 Without these steps in a structured system the lessons learned process will deliver little value.</p> |

| Lesson No | Lesson Title | Learning | Phase | Theme | Recommended Action |
|-----------|---|---|-----------------------------|---|--|
| 9 | Insufficient attention to Quality and Strategy documentation. | Relatively low attention to the production of and compliance with Quality and Strategy documentation before Project Reset. | Project Initiation | Theme 1 - Develop organisational capability to enact lessons. | <p>9.1 Quality Management should be considered at the Project Initiation Stage and in the PID (Project Initiation Document) if the PRINCE2 methodology is employed and should be considered in any case irrespective of the methodology.</p> <p>9.2 A Quality Management document should describe the quality techniques and standards to be applied and the responsibilities for achieving the required quality levels.</p> <p>9.3 Quality documentation should also comply with CMM_2 (Capability and Maturity Model Integration) compliance at level 2 to ensure avoidance of error repetition in business processes.</p> |
| 43 | Implementation Partner - Due Diligence | Projects need a Quality Assurance component to ensure that implementation partner due diligence includes confirmation of key technical deliverables and ability/obligation to deliver these, prior to engagement. | Startup, Project Initiation | Theme 1 - Develop organisational capability to enact lessons. | 43.1 The tender response evaluation should include a Quality Assurance planning component in the PID (Project Implementation Document) to ensure that potential implementation partners are able to demonstrate that they have the technical ability/resource to actually deliver all technical requirements, including reference sites and third-party assurance. |

| Lesson No | Lesson Title | Learning | Phase | Theme | Recommended Action |
|-----------|---|--|-------------------------------------|---|--|
| 52 | Project Management Toolkit needs review & relaunch to support Project Control | The Project Management Toolkit needs review & relaunch to support Project Control. In particular it should be road-tested for adequacy against the Oracle project lessons learned & updated accordingly. In particular the absence of provision for a Project Initiation Document (PID) is noted & within that reference to the key content that would be called up under a PRINCE2 methodology application such as (1) Roles & Responsibilities and (2)Risk Management plan and (3)Training Needs Analysis and (4) Communications Plan , all of which are notably absent or inadequate from the Business Case of the Oracle Project Initiation documents. | Startup, Direct, Project Initiation | Theme 1 - Develop organisational capability to enact lessons. | 52.1 Review and relaunch Project Management toolkit in any event & in particular to address the inadequacies of the Oracle project initiation document set. 52.2 The review/relaunch should address a number of the recommendations herein made which should be called up from the updated business process and toolkit specification |

| Lesson No | Lesson Title | Learning | Phase | Theme | Recommended Action |
|-----------|--|--|---|---|---|
| 53 | Introduce Project Planning approach & template(s) as part of the Project Management Toolkit for Project Manager callup to each new project | There was no standard approach available to project management planning - either as to tool to be used or the way project planning should be executed within the Council. There was no investment in either project management tooling such as Microsoft Project or the expertise to understand or use it. After project reset the new PM had to insist on a more thorough and comprehensive approach to project planning and insist that all parties, particularly the Implementation Partner should follow this. | Startup, Project Initiation, Control, Manage Product Delivery, Manage Stage Boundaries, Close Project | Theme 1 - Develop organisational capability to enact lessons. | <p>53.1 Some basic investment and agreed use of Project Management tooling and approach should be made and specified as normally accepted ways of working - probably to be called up from the Project Management Toolkit.</p> <p>53.2 Project Management plan templates should be generated and made available to be accessed by the PM of new projects. These should include high level general deliverables that will be common to most projects with their normal allocation of responsibility within the Council so that good practise is referenced from the outset. For example:</p> <ol style="list-style-type: none"> 1. PID preparation with its respective strategy contributions 2. Stage boundaries and what is normally expected in each stage 3. The inclusion of the key deliverables from the deliverables register 4. The inclusion at the agreed time of the Roles & Responsibilities listing including important supporting functions such as Legal, OD, Training & Comms with an agreement that their resources will be allocated and committed according to the Project Plan |

| Lesson No | Lesson Title | Learning | Phase | Theme | Recommended Action |
|-----------|---|---|--|--|---|
| 6 | No effective Project Management methodology until Reset | <p>VoG did not implement or train in the use of a project management methodology.</p> <p>The Implementer did not operate to a clearly stated and evidently used methodology.</p> <p>In this situation project good practises are difficult to achieve and maintain.</p> | Startup, Project Initiation, Project Reset | Theme 2 - Make Project Management methodologies, controls and tools effective. | <p>6.1 Project should not be approved to proceed unless & until the methodology by which it is to be managed is clearly specified and communicated.</p> <p>6.2 Revision of the Council's project management toolkit to ensure that an appropriate Project management methodology is used to supported project start up and execution.</p> <p>6.3 The action checklist and risk register for new projects should include a reference to project methodology to be used from the startup gate when a decision should be made. This should then be trained into the project team.</p> <p>6.4 The methodology may be chosen to suit the project type and might be typically PRINCE2 or Agile.</p> |
| 20 | Project Gateway control system required in Project Management | Many lessons converge in the common denominator namely: Project Gateway control system required in Quality Management. This enables the system for CMMI (Capability and Maturity Management Integration to bite on Business Processes and Ways of working. | Project Initiation, Manage Stage Boundaries | Theme 2 - Make Project Management methodologies, controls and tools effective. | 20.1 A Project Gateway control system should be introduced in Quality Management at stage boundaries. This should be included in the PID at the Initiation Stage. |
| 21 | No effective Risk Management approach in place prior to Project Reset | There was no visibility prior to Project Reset that the project was bearing high level risks for areas of critical failure such as data migration and test. The highly unusual contractual attribution of System Test had not been identified as a risk and neither had the lack of mature Client testing capability for Data Migration. | Startup, Project Initiation, Manage Stage Boundaries | Theme 2 - Make Project Management methodologies, controls and tools effective. | <p>21.1 From the project initiation stage there should be specified and effective risk management techniques and standards applied and the responsibilities for achieving an effective risk management procedure.</p> <p>21.2 Attention to Risk Management review at each stage gate is required with suitable independent appraisal.</p> |
| 7 | Testing capability & Infrastructure is essential | <p>The Council has Inadequate testing capability & Infrastructure</p> <p>VoG does not have & therefore failed to use a recognised testing tool set into the project prior to Dec 2021 with the result that there was a deficient test record with deficient test scripting and record of test execution. The Mastek proprietary testing tool had to be used</p> | Project Initiation, Manage Product delivery | Theme 3 - Make testing infrastructure and capability effective. | <p>7.1 Testing capability & Infrastructure is essential & should be introduced within BAU to support projects. 7.2 The PM should be able to call up this basic capability from his PID & Project plan.</p> <p>7.3 VoG needs an encompassing testing application that helps with all aspects of testing from test case management down to running tests. It then reports on all of this.</p> <p>7.4 This testing tool, infrastructure and in house capability should be enhanced by resource recruitment for individual projects as required with resource recruited for and charged to the project - marked up if & as necessary to cover the cost of the infrastructure.</p> |

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| | | and there was no retention in VOG of ongoing infrastructure and competence | | | <p>7.5 The Implementor should then be asked to use the VOG test tool such that VOG has retention of the testing scripts & records.</p> <p>7.6 As referenced to other lessons the Implementor would use the test tooling for Unit & System testing and VOG for all testing which follows system acceptance, principally UAT & PPR.</p> |
| 14 | Testing strategy, management toolkit and test & scripts repository | <p>A Testing strategy Management toolkit and test & scripts repository is required at the project startup gateway with training to testers wherever a project requires testing activity above an agreed threshold.</p> <p>In the Oracle project the testing approach was immediately flawed by the contractual decision that System Testing should be the Client responsibility which should never have been the case. This should have been identified by full and frank discussion between Implementor & Client because it is generally regarded unacceptable, placing an onerous responsibility & massive risk on the Client. The scale of the testing responsibility placed upon the Client by this single major contractual decision was not recognised by the Client and neither was it explained by the Implementor.</p> <p>The immediate consequence was the need for a major increase in testing approach design effort and workload which should have been set out in the testing strategy but none of this was recognised by the Client nor highlighted by the Implementor who had a prima fascia duty to point</p> | Startup, Direct, Project Initiation, Manage Product delivery. | Theme 3 - Make testing infrastructure and capability effective. | <p>14.1 In conjunction with lesson 7, there should be introduced a testing strategy, management toolkit and test & scripts repository at the project startup gateway.</p> <p>14.2 For the ongoing quarterly testing of Oracle the test scripts should be brought forward into the chosen tooling where the test scripts have an ongoing value in manual and automated testing on future quarterly releases.</p> <p>14.3 For other projects the Project Startup stage should identify whether it has a testing requirement that requires test facility provisioning.</p> |

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| | | <p>this out to the Client.</p> <p>The existence of a project Start-Up gateway would have checkpointed this matter for pre contract decision review at the testing strategy level and also cross checked testing capabilities and competences. This would also have identified the importance of the Implementor Unit testing phase giving output of test scenarios and scripts to the Client for the System Testing phase but this did not happen and the Implementor sought to evade responsibility in this matter. In retrospect I conclude that this was because the Implementor had not done the unit testing job to an acceptable level where they could demonstrate the unit test outputs to hand on to System Test in this unusual contractual relationship/</p> <p>Once the project was started, Excel was used as a generic test management tool which is not sufficient for the demanding test requirements of the project - this was originally used under the failed project management regime in 2021.</p> <p>Following the project management reset the Mastek proprietary tooling was used which was largely sufficient for purpose and previous failings were recovered.</p> <p>At the close of the testing phases of the project, the decision on the way forward remained open as to the future of testing both within the live system for Oracle Cloud quarterly</p> | | | |

| Lesson No | Lesson Title | Learning | Phase | Theme | Recommended Action |
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| | | testing requirements and for the test strategy gateway management for other future projects. | | | |
| 33 | Selecting an Implementation Partner | The tender document and sales pitch clearly showed an issue with attention to detail on Evosys part, which was raised at this time as a concern. | Startup | Theme 4 - Make project team planning effective. | <p>33.1 A Project Manager (PM) should be appointed, in place and be an approval signatory to the PID in order to pass through the Project Initiation Gateway.</p> <p>33.2 The PM should be qualified to support the Sponsor in the appointment of Implementation Partner.</p> <p>33.3 The PM should be a subject matter expert in the substance of the Project In this case - right from the Project Initiation stage there should be a PM in place who has experience on a HCM/Finance/Payroll implementation</p> |
| 34 | Project Team requirements should be rigorously assessed | The project implementation plan was very ambitious, realistically it could never be completed within those timescales without a separate project team. We should have set up a project team from day 1 to work alongside normal staff. This was the process in place when we implemented EBS Oracle. Future consideration should be given by the organisation as to whether there is the required capacity to undertake such projects, combined with everyday operational work. | Startup, Project Initiation | Theme 4 - Make project team planning effective. | <p>34.1 Project Team requirements should be assessed at the Project Start Up & Initiation stages and included in the PID in order to be rigorously assessed.</p> <p>34.2 In this case We should have set up a project team from day 1 to work alongside normal staff. This was the process in place when we implemented EBS Oracle.</p> <p>34.3 Future consideration should be given by the organisation as to whether there is the required capacity to undertake such projects, combined with everyday operational work.</p> |

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| 55 | Clear Contractual Scope of Works for Inclusion in Legal Documents (particularly contracts) | Suitable efforts should go into agreeing and signing off a detailed scope of works at the outset of the project, which can focus the customers mind on being clear about its detailed requirements from the start, with clarity for the IT contractor on what they are working towards. Any deviations from that scope which are likely to impact cost and timescale requires careful logging and dealt with in accordance with any agreed contract change mechanism. | Project Initiation, Manage Product Delivery | Theme 2 - Make Project Management methodologies, controls and tools effective. | 55.1 Closer involvement and clearer timescales for legal involvement in high-risk projects. |
| 56 | Management of Stage Boundaries to include reference to Legal Services if contractual obligations are not being achieved. | A mechanism for earlier escalation from the project team to Legal Services at certain intervals in the duration of the contract could potentially assist in future projects. This will depend on the views expressed by others involved in the management of the project. Legal Services' and the provision of legal advice and support operates on the basis that instructions come into Legal Services at the point at which a legal opinion/advice is required, as determined, and agreed by the relevant service area/project team. Milestones/assessment of risk could function as the trigger to bring in legal advice at various stages within the | | Theme 2 | 56. 1 Consideration of Legal Services at Quality Board |

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| | | <p>timeline of the project/duration of the contract.</p> <p>Consideration of the ability to make use of any agreed dispute resolution mechanisms in the contract can be helpful in resolving disputes before they escalate.</p> | | | |
| 59 | Fuller Engagement of Legal Services is required once a project is identified as high risk | <p>Strict wording of the contract between the parties in the event of a dispute between the parties on the assertion of a breach of contract is highly material. This exercise can take time as it will identify not only the express contractual obligations which the parties are under, but also:</p> <ul style="list-style-type: none"> • Clarified which pre-contract representations have become terms of the contract. • Set out how the parties have attempted to limit or exclude any liability they may face, including liability for any representations which did not make it into the contract. • Cater for consequences of any | Project Initiation, Manage Product Delivery | Theme 2 - Make Project Management methodologies, controls and tools effective. | 59.1 Ensure that Legal Services are fully engaged as part of any contractual discussions prior to any contract being agreed. |

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| | | breaches, including setting out grounds for termination; and • Provide a contractual mechanism for the early resolution of disputes. | | | |

15. Appendix 2 - Other lessons with recommendations (ordered by Theme/Lesson Number)

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| 51 | Legal Dept Steerco engagement for high-risk projects | <p>Whenever a project with an external purchase element is rated as high risk it should have a legal dept representation at Steerco for the high-risk period.</p> <p>In the case of the Oracle Cloud project there would probably have been legal dept representation from the outset as it was immediately high risk on the Project Management Toolkit checklist. There would also most likely have been legal dept engagement for the project reset.</p> <p>In the event Legal Dept were asked to engage when we reached an impasse on the Change Requests in 2023.</p> | Startup, Project Initiation | Theme 1 - Develop organisational capability to enact lessons. | <p>51.1. Whenever a project with an external purchase contractual element is rated as high risk it should have a legal dept representation at Steerco for the high-risk period.</p> <p>In the case of the Oracle Cloud project there would have been legal dept representation from the outset as it was immediately high risk on the Project Management Toolkit checklist.</p> |
| 11 | Remote execution of projects achieved | This was born of necessity with the coronavirus pandemic but was a major positive - previously accepted leading practice was that an onsite presence was the preferred working method. | Startup, Project Initiation | Theme 2 - Make Project Management methodologies, controls and tools effective. | 11.1 Application to other projects is possible with the use of learnings from the Oracle project. Working style should be a review point at project start up gate. The Project Management Toolkit should specify how remote working tools are to be used and Business Improvement should facilitate rollout. The PID should say what tools are to be used how. |

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| 15 | Multiple iterations of data migration required | Data Migration (DM) is a prerequisite to System Test and is normally correctly placed upon the Implementation Partner. The learning here is that because the contract placed the system test responsibility upon the Client, the Implementor sought to evade responsibility for DM failings upon the alleged system test deficiencies by the Client. Because DM is such a specialist and complex area it is was very difficult for the Client to stand their ground against the Implementor whose DM work was in fact severely deficient. The Client had reasonably not expected to have to stand up a fully prepared and matured team to test the DM itself and challenge the multiple and complex deficiencies of DM at the first and second DM trial runs. | Startup, Manage Product Delivery, Manage Stage Boundaries | Theme 2 - Make Project Management methodologies, controls and tools effective. | <p>15.1. The Council must require a more robust, structured and controlled gateway for DM on future projects.</p> <p>15.2. The Council must ensure that it has sufficient expertise to manage this gateway. The Council must ensure that it requires System Test to be an Implementor responsibility</p> |
| 16 | Redesign of payroll data structure required | A redesign of payroll data structure was found to be required at the PPR stage because the new system had a fundamental design flaw, namely that it could not manage staff absences at the requisite level of granularity to comply with Oracle specification. | Start Up, Project Initiation | Theme 2 - Make Project Management methodologies, controls and tools effective. | 16.1 Control at startup gateway for System Test to be an Implementor responsibility |

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| 23 | <p>Covid 19 extent & duration overwhelmed planning assumptions and strategies in 2021 with knock on effects to 2022</p> | <p>Covid 19 extent & duration overwhelmed planning assumptions in 2021 and into 2022, despite the successful development of remote working techniques. Key personnel were also focused on pandemic response which had not be foreseen at the commencement of the project.</p> <p>The development of remote working techniques progressed well, but it was not possible to keep the project on its original track or duration. As duration extended so did cost which was driven by personnel costs.</p> <p>In 2021 the project was progressively falling further short of its timeline and objectives such that a project reset was called in December 2019, though the extent of the project failure was underestimated at that point because of many other project failings which are the subject of this report. The extent of these other failings and the failure to correctly assess them at the project reset point of Dec21 then caused further delay and cost increase such that the August 22 Go-Live replan could not be achieved and the project finally went live in April 2023.</p> | Project Initiation | Theme 2 - Make Project Management methodologies, controls and tools effective. | <p>23.1 That a quality management plan with risk register be introduced for future projects over an agreed threshold at the Project Initiation Stage gate.</p> <p>23.2 Whilst no Quality Management Plan would have been likely to have overcome the Covid 19 pandemic, the impact on the project would have been mitigated by the use and amendment of a Quality plan. Because there was no overall Quality plan there was a progressive reluctance by the Implementor to give proper adherence to the stage gate qualification of their product delivery particularly where the construction of the contracts allowed them to evade their proper responsibilities on the key matters of unit test, system test and data migration.</p> <p>23.3 That the Organisation consider at the onset, when embarking on significant development and transformational projects whether they have the capacity to deliver inhouse.</p> |
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| 25 | Project Planning and Initiation (Engagement with Stakeholders) | Further engagement was needed with parts of the business earlier on in the project. | Startup, Project Initiation, | Theme 2 - Make Project Management methodologies, controls and tools effective. | <p>25.1 Communications Strategy within PID at Initiation stage required to address:</p> <ol style="list-style-type: none"> 1. Early and effective engagement with stakeholders to ensure the project's scope, objectives and deliverables are set correctly and they all meet business needs. 2. Identify stakeholders' roles, expectations, and level of involvement to enable effective planning with the right resources and timeline. 3. Understanding of services/needs and objections would have been useful insight for comms strategy - too often pushing info on requirements of users not benefits to them (added by RJ) |
| 27 | Communication (Fusion Mailbox) | Fusion mailbox ,as the main communication channel, assisted in centralized communication, efficient information sharing and team collaboration. | Hypercare (GoLive) | Theme 2 - Make Project Management methodologies, controls and tools effective. | No action |
| 28 | Cost and Budget Management | Budget building should have been on a worst case scenario basis not best case scenario. | Startup, Project Initiation | Theme 2 - Make Project Management methodologies, controls and tools effective. | 28.1 The project budget should have been shared, revised, and agreed with other involved stakeholders to ensure it covers all costs correctly. Initial costings at Start-up should be reworked at Project Initiation in more detail and note taken of the PID document specifications. It should be prepared with input from Finance and in accordance with their guidance in relation to the risk register. |

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| 30 | Comms planning | High level outline comms plan was not developed into detailed comms plan aligned to project milestones and goals. This was in large part due to lack of certainty around objectives/actions/timescales. The outcome was that we fell into very scattergun comms planning as project neared go-live. The sign-off process was also unclear, leading to incomplete information being issued and delays in messaging. | Project Initiation, Manage Product Delivery | Theme 2 - Make Project Management methodologies, controls and tools effective. | 30.1 Detailed comms plan to be aligned with project plan. Comma strategy / plan should be set out in the PID at the Initiation stage & cross referenced to the stakeholder analysis. |
| 32 | Comms and Training Stand-ups | Twice weekly stand-ups were very effective at managing a very agile comms plan. Stand-ups pulled together comms support, project management tea, and functional leads as an effective subgroup. Buy-in from key functional leads was useful in progressing actions quickly. | Direct, Project Initiation, Manage product delivery. Hypercare. | Theme 2 - Make Project Management methodologies, controls and tools effective. | 32.1 Establish as standard practice for future projects. |
| 35 | Concerns raised with Payroll Lead with System Implementer | Concerns were raised at an early stage about the knowledge and experience on the Payroll Lead in Evosys, however, the individual was not replaced until late August with a go live date of November, this was already much too late. | Project Initiation, Manage product delivery | Theme 2 - Make Project Management methodologies, controls and tools effective. | 35.1 Need to ensure the right people are in the key posts in a project, and that includes the correct qualified and experienced people in the implementation partner. Review of Implementation partner personnel / CVs at the Initiation Stage is generally the best time & place to get this right. |

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| 36 | Entry and Exit gates at various phases of the project were not adhered to | Both entry and exit gates for different phases of the project were gone through without reaching the specified criteria. | Direct, Initiate Project, Manage Stage Boundaries | Theme 2 - Make Project Management methodologies, controls and tools effective. | 36.1 Defects should have been fixed at the phase of the project they were found in, adopting the approach of not adhering to these gates just moved the problems through one phase to another, which then made the subsequent phases a bigger problem. |
| 37 | Too many meetings and emails | There were a large number of meetings to do with the project, many days these were back to back, whilst you were still expected to be completing project work and the day job | Project Initiation, Control, Manage Product delivery, | Theme 2 - Make Project Management methodologies, controls and tools effective. | 37.1 Better planning and thinking around what meetings are actually needed and who needs to be at them. The PID and project plan should set out expectations and plans for frequency of each type of meeting. |
| 38 | Training and Comms Stand-up | Once implemented the Training and Comms weekly Stand-ups were very useful and an effective way to move both areas forward at pace. It was more useful when the meeting covered both in high level, rather than having separate meetings for each. | Project Initiation, Hypercare (Go-Live) | Theme 2 - Make Project Management methodologies, controls and tools effective. | 38.1 Call up via the Project Management Toolkit to Implement as a practice for all large-scale projects going forward - specifying this in the PID for both Communications and Training strategies |
| 39 | Training Requirements Scoping | Training requirements scope happened too late in the process, which resulted in an additional spend and a tight window for learning for the original delivery date. OD&L Team we're also involved too late to be able to provide advice on how to approach learning requirements. | Project Initiation, Prepare | Theme 2 - Make Project Management methodologies, controls and tools effective. | 39.1 Training Strategy should be included or called up from the PID using the Project Management Toolkit which should also incorporate whatever business process is introduced for the Innovation Lab-specifically: 1. OD&L Team involved in scoping activity to be able to advice on learning requirements. 2. Learning requirements should be considered as part of the project scoping project. |

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| 41 | ICT Risk Assessments and DPIA | <p>In the development phase, live Vale data was accessed from personal devices before a formal DPIA was approved.</p> <p>-IT security and policy elements were retrospectively fitted after live data was already made accessible.</p> <p>-Whilst a draft DPIA was developed, no signed off DPIA was approved prior to making live Vale data available from any device, corporate or personal.</p> <p>- The draft DPIA did not cover third party access to administrative functions from non-corporate devices.</p> | Startup, Project Initiation, Manage Product Delivery, | Theme 2 - Make Project Management methodologies, controls and tools effective. | <p>41.1 As per the project management toolkit:</p> <p>-IT security and policy elements are considered and mitigated before live data is made accessible.</p> <p>-A full DPIA is completed prior to making live Vale data available from any device, corporate or personal.</p> <p>-The DPIA should also cover third party access to administrative functions from non-corporate devices.</p> |
| 42 | Clearly Defined Roles and Responsibilities | <p>During the project initiation, there was a lack of clear definition regarding ICT roles and responsibilities (e.g. single sign-on). Roles and responsibilities of departments/functions require clear definition in order to ensure that internal and external roles are clearly defined.</p> | Project Initiation | Theme 2 - Make Project Management methodologies, controls and tools effective. | <p>42.1 ICT roles and responsibilities and implementation partner roles, responsibilities and key deliverables to be clearly defined at the start of any project, including formal signoff by key stakeholders regarding strategies and deliverables.</p> |

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| 44 | Design Proposal Documentation by Implementation Partner for Key Deliverables: Deliverables Register | Critical design / architecture elements should be covered off and design proposals should be documented by the implementation partner, for key deliverables, and agreed by the client at project implementation. | Startup, Project Initiation | Theme 2 - Make Project Management methodologies, controls and tools effective. | 44.1 Critical design / architecture elements are covered off and design proposals should be documented by the implementation partner, for key deliverables, and agreed by the client at project implementation in future projects. A clear list of all project deliverables to be available at PID stage in order to understand each parties responsibilities are clearly defined and capable of critique. This should be formalised into a "Deliverables Register" |
| 45 | Single Point of Dependency of ICT Project Resources | The project initially managed with two in-house Oracle DBA's, one of whom left the authority at the beginning of the project. A replacement was not employed, leaving a Single Point of Dependency. No provision was made for this single point of dependency being unavailable either during a critical period or if there was a problem which no one else could look at. There was no back up for this resource and no coordination with pre-planned annual leave which led to multiple instances of the resource being unavailable when required. | Project Initiation, Manage Product Delivery | Theme 2 - Make Project Management methodologies, controls and tools effective. | 45.1 Suitable technical resources are assigned to future projects and ensure there are no single points of dependency. |
| 47 | Implementation Partner Deliverables | The council had no prior knowledge or experience of implementing Fusion or providing access to Fusion functions securely from corporate and non-corporate devices; the not unreasonable assumption was that the partner would have detailed technical knowledge and complete the work. | Project Initiation, Direct, Control | Theme 2 - Make Project Management methodologies, controls and tools effective. | 47.1 Ensure implementation partner is required contractually to implement all aspects of their solution, using their past experience and technical ability. |

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| 49 | Clear and Realistic communication on project timelines | Sometimes there was a lack of realistic communication regarding project timelines which led to wasted resource and sometimes a lack of engagement on future deadlines. This impacted morale of the project team at times. | Manage Product Delivery | Theme 2 - Make Project Management methodologies, controls and tools effective. | 49.1 To ensure that there is clear and realistic communication internally to reduce the volume of wasted effort within the project. Particularly in the context of very limited resource available and challenging timelines. Clear and honest communication will assist with morale on the project implementation. |
| 50 | Clear Documentation on the Interdependencies of the Project | The finance reporting and a number of other items piece were dependent on a preparation of an integrated HR/Payroll and Finance Environment and this led to a significant resource requirement late in the project at the same time as a number of critical workflows such as data migration, user training etc. | Project Initiation, Manage Product Delivery | Theme 2 - Make Project Management methodologies, controls and tools effective. | 50.1 A full clear understanding of interdependencies and impact of workflow on workstreams and project resources |
| 54 | Innovation Lab Business Process | Project candidates evaluation and the Start Up phase of a project may be improved with the use of the Innovation Lab Business Process as attached | Startup | Theme 2 - Make Project Management methodologies, controls and tools effective. | 54.1 That the Business Improvement Team review the proposed Innovation Lab Business Process to evaluate its possible inclusion in the Project Management Toolkit |
| 57 | Quality of Record Keeping for Ongoing Engagement of Legal Services | Legal Services note the requirement for good quality record keeping, clearly recorded/worded meeting minutes is important to assist when Legal Services are required get involved assist in formulating instructions, the advice is only | Manage Product Delivery | Theme 2 - Make Project Management methodologies, controls and tools effective. | 57.1 Ensure templates available as part of the project management toolkit are capable of ensuring good record keeping and the creation of clear concise documentation. |

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| | | <p>effective and capable of forecasting merits if the instructions are clear and the documents are in place. The nature, value and complexity of the project suggests that earlier involvement of legal expertise may have benefited the project or a mechanism to review at various stages within the duration of the contract to bring in legal advice and support when there are early concerns in respect of the progression of the project, achieving 'go-live' in circumstances where there is escalating costs.</p> | | | |
| 58 | Engagement of Legal Services to Review Change Requests | <p>Timing for identifying the point at which delays started to creep in and costs started to escalate and a potential mismatch between the parties' expectations which started to create tension between them could in future serve as a trigger to a request for earlier legal advice and support.</p> | Manage Product Delivery | Theme 2 - Make Project Management methodologies, controls and tools effective. | 58.1 Ensure that project management during project delivery stage identifies and communicates any mismatch of expectation between parties. |
| 3 | System Test wrongly contracted to VoG | <p>VoG allowed Mastek to write the contract such that System Test was a VoG responsibility which was a fundamental flaw in the whole project approach with irreversible knock on effects which then had to be worked through to the detriment of VoG. The error went to the root of the contract and the execution of the project.</p> | Project Initiation | Theme 3 - Make testing infrastructure and capability effective. | <p>3.1 Action checklist & startup gateway for new projects to include a reference to testing phases & responsibilities. System test should always be an Implementor rather than Client responsibility.</p> <p>Contractual review should also take care to review where system test responsibility resides.</p> |

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| 4 | Inadequate Unit testing by Implementation Partner | VoG had little or no test script input from Mastek because they had only completed unit test as required under the contract and VoG had not required them to evidence this work with proper audit trail. This required VoG to create its own test scripts from scratch - whilst the Implementor sought to evade the Client requests and was non cooperative. Testing requirements should be identified at Start Up stage and, where appropriate, be factored into contractual responsibilities. | Startup, Direct, Project Initiation, Direct, Control, Manage Stage Boundaries | Theme 3 - Make testing infrastructure and capability effective. | <p>4.1 Action checklist for new projects to include a reference to testing phases & responsibilities. Unit test should always be a check listed item for its requirement, extent and evidence to be provided on pass/fail & remarks. Following on from Unit Test, System test should always be an Implementor rather than Client responsibility where the software is proprietary and an Implementation Partner is involved..</p> <p>4.2 The project start up gateway should have a testing checklist of questions to evidence the record of decisions made & positions taken at this juncture. There should be a specification that unit testing should be evidenced in the gateway control from unit test to system test to ensure it has been properly done and the outputs are available to system test.</p> |
| 5 | Failure at initial system test before project reset | VoG failed to recognise their responsibility to stand up a project team to work alongside the Implementor for System Test under the contract contributing to a failure at the system test stage before reset. Once this failure occurred the the System Implementor repeatedly sought to attribute UAT test failures to the Council rather than to acknowledge their own failings in system design and inadequate unit test. Thereafter the attribution of responsibility was unavoidably contentious. | Startup, Direct, Project Initiation, Control, Manage Product delivery | Theme 3 - Make testing infrastructure and capability effective. | 5.1 The action checklists, including contractual, at early stage boundaries and the risk register for new projects should include a reference to test requirements. Particular care should be directed as to where the responsibility for each stage of testing will reside and who has contractual responsibility. The key stage gate is the exit gate from Initiate Project and before contractual awards. |
| 17 | Multiple iterations of payroll parallel running required | <p>The key learning here is that the degree of difficulty of passing the PPR test is immensely greater when the Implementor has not been required to pass system test in the first place and the Client is required to progress through both System Test and UAT under pressure of time.</p> <p>The only way to prevent this is to require the Implementor in all cases to bear the contractual responsibility for System Test to avoid the massive load this otherwise</p> | Startup, Project Initiation, Control, Manage Product delivery | Theme 3 - Make testing infrastructure and capability effective. | 17.1 The Client must never take responsibility for System Test except where exceptionally referred to very senior level within the organisation at the Startup gateway. |

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| | | places on Client testing responsibility. In most cases the Implementor sought to evade responsibility by claiming deficiency in the Client stepping up to the mark with the testing commitment of resource to testing. | | | |
| 19 | Flawed & unfit payroll system design by Implementor for Absence Management | <p>The Implementor did not follow Oracle's guidance on design for absence management which resulted in very late stage failure in User Acceptance Testing. The system as designed could not process employee data at the required level of granularity & was therefore unfit to pass UAT .</p> <p>This was a very serious system design problem going to the root of the whole system - Client testing picked up the problem in a repeated round of UAT but avoidance of future "like" problems probably requires a start up gate control which specifies that any contract where system testing is specified as a Client requirement must be referred to a highest level of review within the Council</p> | Project Initiation, Control, Manager Product delivery | Theme 3 - Make testing infrastructure and capability effective. | 19.1 Start-up gate control which specifies that any contract where system testing is specified as a Client requirement must be referred to a highest level of review within the Council |
| 8 | Appoint appropriately qualified PM in a timely fashion. | <p>Project Manager initially appointed too late and had inadequate experience for a project of this size & type.</p> <p>Unless the Council is sure it has all necessary specialist expertise for the award of the contract for any new system, it should appoint the PM before contract award of appoint a suitable authority to ensure that contract terms and conditions</p> | Startup, Project Initiation | Theme 4 - Make project team planning effective. | <p>8.1 Key personnel requirements, particularly PM, should be identified and appointed in accordance with the specified methodology in respect of timeline & responsibilities.</p> <p>8.2. Council should ensure that there is always a suitably qualified authority in place, normally the PM, at the point of contract award.</p> <p>8.3. Council should ensure that PM is suitable qualified and experienced.</p> |

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| | | are in the Council's best interests in terms of responsibilities to be undertaken. In this case the misplacement of System Test to the Council was the cardinal failure. Also the Data Migration Contract was not sufficiently robust to protect the Council interests. Both of these failures could have been avoided. | | | 8.4. Council should regularly review performance of PM against the agreed project timeline and if a significant project with significant spend this regular updates by sponsor should be provided to SLT |
| 10 | Training Needs Analysis Required at Project Initiation Stage | The training requirements were not considered adequately in a strategy at the outset with the consequence that there were different expectations of the way that key and end users would be educated in the use of the system. The OD dept was not involved as a stakeholder at the Project Initiation stage but were able to contribute strongly later in the project. Some Actors had the expectation that formal external training would be provided whereas the project charter only referred to on-the-job training to follow a user training, that is to say there would be a train-the-trainer approach. | Project Initiation | Theme 4 - Make project team planning effective. | 8.5 At the project initiation stage there should be a clear documentation of project strategies including training strategy, encompassing a training needs analysis. This would avoid differing expectations and all that flows from that. Organisational Development should be identified as a stakeholder and execute a review and contribution to the matter. During the course of the project a mitigation action was agreed to engage a specialist Oracle Training Provider to assist in some areas and User training was finally brought to a successful conclusion. This should be included in the Project Initiation gateway control. |
| 12 | Realistic Project Team Requirements Assessment | The key learning point is that realistic Project Team Requirements Assessment is required. In this project incorrect assessments were made with the result that conflicting expectations of resource availability for execution of project deliverables occurred in all areas of the project. For reasons that not fully documented an unrealistic assessment was made as to project team requirements. The decision was made that only an external Project Manager (PM) was required. This failure was not identified and corrected before the project failure and reset in December 2021 when a new PM was appointed. The matter was | Project Initiation | Theme 4 - Make project team planning effective. | 12.1 Rigorous analysis is required in the project start up stage and a clear decision point documented under the heading project team requirements. All future projects in excess of £100K (or agreed value) should go through an initiation gateway which has this in the checklist. This item applied to all functional areas so I have recorded it as a Business Improvement item for the enactment of the lesson learning in due course. |

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| | | then identified and corrected with the progressive expansion of the project team to include Functional Leads for each of HR/Payroll and Finance, Test Team Lead & Testing Team. The initial failure had knock on effects through the project life with continuing tension between stretched BAU & project requirements where both teams were overstretched whilst budget was progressively exceeded. | | | |
| 13 | Key Project Actors require basic Project Management accreditation | Key Project Actors require basic Project Management accreditation This will give the project actors to undertake their responsibilities with the necessary minimum training for the tasks required of them. For reference purposes the Prince 2 Foundation Level is referenced: To deliver projects on time and within budget, manage risk and mitigate perceived problems | Project Initiation | Theme 4 - Make project team planning effective. | 13.1 All future projects over an agreed threshold should required key project actors to attend basic project management accreditation training. The OD group should be charged with bringing such training into place to be accessed online with the Authority's training offering. |
| 18 | Peer review on key points was valuable | The facility for high level peer review was valuable at difficult points in the project and particularly where the issue was contested by the Implementor. It is a good technique for defusing an item and shedding light not heat. | Project Reset | Theme 4 - Make project team planning effective. | 18.1 Business Improvement Team to look for the possible use of this technique at the project start up stage with a clear checkpoint at the startup gate. |
| 26 | Project Execution and Implementation (Client Group Access) | Client group access was not considered until later stages | Direct, Initiate Project | Theme 4 - Make project team planning effective. | 26.1 Further consideration given to all requirements of the business and training developed for all areas |

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| 29 | Comms - stakeholder analysis | Project would've benefited from a more detailed stakeholder analysis at the outset. A better understanding of who would be using the platform and for what would've allowed for more tailored comms to certain audiences and improved engagement with the project and platform at launch. This has developed over time and comms are now more targeted but the breakdown was perhaps too simplistic at the outset. | Project Initiation | Theme 4 - Make project team planning effective. | 29.1 Enhanced stakeholder/audience analysis in future: this should be included in the PID at the Project Initiation Stage. |
| 46 | Non-Corporate and Third Party Access to Systems - Requirements | Functional requirements should be clearly defined at the start of the project in relation to how non-corporate and 3rd parties would access Fusion from non-corporate devices. | Startup, Project Initiation | Theme 4 - Make project team planning effective. | 46.1 Functional requirements should be clearly defined at the start of any project in all aspects of the required solution, to avoid scope creep and so ensure there is no ambiguity in terms of understanding exactly what is required from a solution. For non-corporate and 3rd parties all potential access requirements need to be defined. |

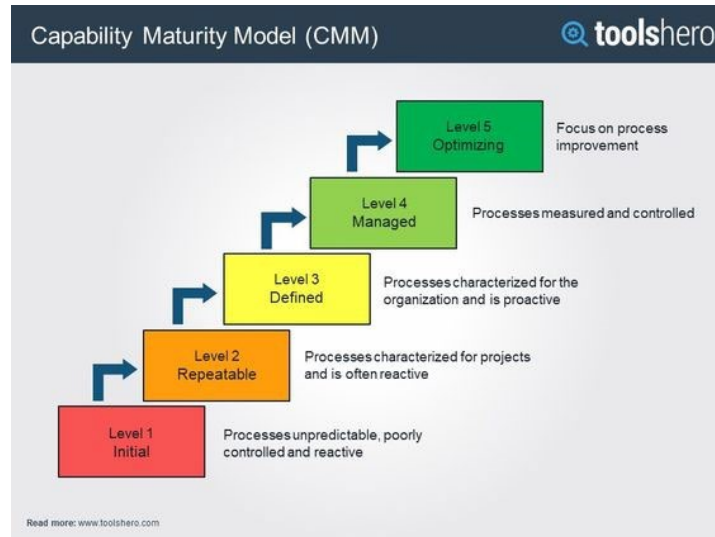
16. Appendix 3 – Capability and Maturity Management

The following appendix explores the benefit of the development of Lessons Learnt tooling within Capability and Maturity Management (CMM) to enable business performance improvement.

- For the enactment of lessons learnt It is recommended that note is taken and reference made to leading practises of business performance improvement. In particular lessons learnt should be enacted to cause repetition of good practise and avoid repetition of poor practise. Capability and Maturity Management is the generic description for these matters and CMM Integration (CMMI) published by ISACA is an international performance improvement model for organizations that want to achieve increasingly better performance and solve business challenges. Courses and training are available to assist organisations in a standardised framework of measurable business processes improvement.
- The recommended implementation of Lessons learnt tooling will enable the repetitive performance of good practise by the enactment of lessons learnt so as to enable demonstration of auditable progress of repeatable improvement of business practises in the execution of projects within the organisation. The incorporation of lessons learnt tooling within the Council project management toolkit will advance the business improvement journey as it is applied to new projects as appropriate.
- The objective of this approach is to progress projects from unpredictable processes (level 1) to predictable and repeatable processes (level 2), then defined proactive processes (level3) for project management; the journey progresses to project processes which are defined, measured, controlled and optimised. Along this journey lessons learnt are identified, documented, analysed, stored and retrieved to be reapplied.
- CMMI is not prescriptive; rather it describes what to do to improve an organization's capabilities, not how to do it. This makes the model very flexible to meet the unique needs of any business. In addition, CMMI complements and enhances performance improvement in conjunction with other industry models and standards. CMMI may be used to establish processes that help an organization or project meet business objectives and improve performance in ways that matter most.
- CMMI helps businesses to quickly understand their current level of capability and performance both in the context of their own objectives and as compared with other businesses. The need for improvement can originate from internal and external sources. Customers may demand improvements. Market forces may drive the need to improve competitiveness. Government or industry regulations may require changes in how an organization operates. Rather than using multiple approaches for achieving similar performance, contractual, or regulatory compliance goals, CMMI provides a single approach or framework, for an organization to address these multiple needs.
- The schematic below illustrates the lessons learnt journey in CMM terms based on experience with the Oracle Cloud project:

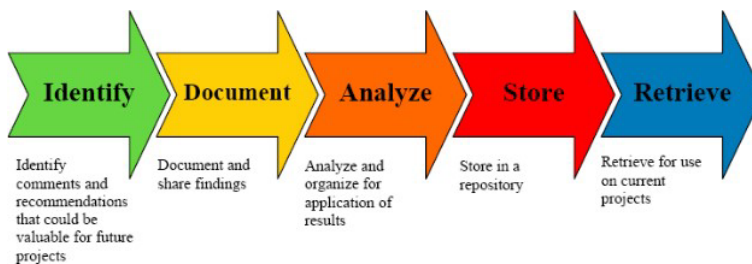
Oracle Cloud Project Lessons Learned

Using leading practise techniques to ensure CMM level 2 repeatable ways of working



- Within the CMM journey lessons learned are processed through the projects that are undertaken to improve the process management of the organisation.

Oracle Cloud Project: The Lessons learned requirements



For further information Case Studies are available on the Lessonflow website and ISACA publish a CMMI adoption guidance document.