

Portfolio Gateway Review 2021-22 Recommendation Action Plan

ID	Recommendation	Priority	Report Section	Actions	Target Date	Lead	Sign Off	Status	Dependencies	Update
Gate001a	Update the stakeholder map, engagement strategy and communications plan	Recommended	8.2 Stakeholders and Communications	Review and update stakeholder map, engagement strategy and communication plan	Nov-21	HH	PB/JC	In Progress	Commencement of Comms and Marketing Officer	Comms and Marketing Officer is in post and action in progress
Gate001b	Establish the potential to make greater use of dashboard information to convey updates to different stakeholder groups	Recommended	8.2 Stakeholders and Communications	Development of P3M tooling and a dashboard of key information for stakeholders	Nov-21	PR	PB/JC	In Progress	Establishment of P3M tooling	Trial of P3M tooling is ongoing and will be completed during September. A preferred solution has been identified and a final demo of the software from the provider will take place w/c 20/09/21. Following this a final report will be created, recommending the software to be adopted, which will be followed by procurement. A survey has been forwarded to all SROs and programme/project leads which includes a question on the information to be included on the dashboard
				Consultation with stakeholders re: scope and presentation of information to be presented in the dashboard						
Gate002	Confirm that the intended Outcomes and Benefits remain realistic given the impact of Covid and Brexit and the shortening of the UKG funding timeframe.	Essential	8.3 Outcomes and Benefits	Clarify UKG funding timeframe and any implications for benefit realisation	Oct-21	PR	PB/JC	In Progress	Dashboard information linked to completion of Gate001b	UKG confirmed on 5/8/21 that benefits realisation timeline remains 2017-33 even though funding profile from UKG ends 2028 due to accelerated drawdown. Portfolio level spending objective benefits have been confirmed and will be reported for the first time in the October quarterly report and updated every quarter thereafter. Following this the wider programme and project benefits will be templated and prepared for report in the next quarter. Work is ongoing to profile the anticipated realisation on an annual basis and reported accordingly
				Review and agree benefits at a Po/Pg/Pj level and establish a framework for the management and realisation of benefits across the Portfolio						
				Incorporate reporting of benefits in dashboard information developed in action Gate001b above						
Gate003	Update the Terms of Reference for, and membership of, the Portfolio Board and ensure that all Members and Attendees understand their respective roles	Essential	8.3 Governance	Review and update ToR for PoB Engagement with PoB members to clarify purpose and roles	Feb-22	PR	PB	In Progress		The Terms of Reference for SBCD Governance Boards will co-incide with the development of Corporate Joint Committees. Direction will be provided by local authority Chief Execs.
Gate004	Identify opportunities for the PoMO to extend its targeted support to constituent Programmes/Projects to reduce the PMO burden on those Programmes/Projects	Recommended	8.5 Portfolio Management and Resources	Completion of Skills Audit with all Pr/Pj	Oct-21	PR	PB/JC	In Progress		A skills audit was completed in early 2021. All required results have now been submitted and an initial report will be completed prior to the October 21 quarterly monitoring report. A survey has been designed and circulated on 14/09/21 to all SROs and Programme/Project leads for feedback on areas of support to be considered by the PoMO
				Review and record the extent of PoMO targeted support to Pr/Pj.						
				Engagement with Pr/Pj Leads and SROs through a survey and direct engagement to identify areas where PoMO could offer support to facilitate development / delivery						
				Review reporting requirements for Pr/Pj and identify any duplication and potential areas for streamlining						