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Action:	For Information	

DCC Operational Metrics Review Project

Project Closure Report

1. Project Closure Report Purpose and Goals

The purpose of this Project Closure Report is to communicate the work achieved by the Project Team, address any final issues and bring the project to an end. The report also captures best practice and lessons learned to inform and improve future projects.

This report provides an overview of the key milestones, successes and issues experienced throughout the course of the project and allows stakeholders to:

- Review milestones in accordance with the brief;
- Identify areas that went particularly well and not so well; and
- Review the items required to close the project.

The OPSG is requested to approve the formal closure of the project.

2. Project Closure Summary

2.1 Project Background Overview

The motivation for this review has been the operational experience of the OPSG in using the set of metrics the DCC provides in the Performance Measurement Report (PMR). One of the responsibilities of the OPSG is to review the PMR each month and, in so doing, the following issues have been identified:

- a. Instances where the reported performance is contradictory to the operational experience of Users;
- b. Instances where the reported metrics, although correct, do not appear to reflect the impact of performance issues on Users;
- c. Gaps in reporting whereby important aspects of operational performance are not being addressed by the current set of metrics.

OPSG members have therefore supported a review of the current metrics, and the Operational Metrics Review project was approved by the SEC Panel on 11 October 2019.

The purpose of the project was to identify improvements in the operational metrics defined in the SEC for the measurement of the DCC Service delivery, with improvements reflecting User requirements and priorities.

2.2 Project Highlights and Best Practice

The project tasks were structured into two main workstreams. The first stream focused on working closely with Users to identify and trial candidate improvements to operational metrics, whilst the second stream focused on performing a full review of the Users' operational experience and existing metrics.

An evaluation framework devised by the Project Team was used to collate feedback and findings from both workstreams to evaluate the outcomes. A final report containing 29 recommendations for improvement was endorsed by the OPSG members and approved by SEC Panel on 17 April 2020.

Highlights

A survey composed of 11 questions, covering three main areas, namely: Users business processes; User views on current PMR; and potential 'Quick Wins' measurements for inclusion in future PMRs, was circulated to all SEC Parties for completion. A total of 15 responses were received providing the Project Team with good initial insight into business requirements and areas for improvement in operational performance reporting.

The Project Team invited OPSG members and representatives from BEIS, the DCC and Ofgem to attend two workshop events in December 2019 and January 2020. Both events were well attended and included a breakout session that allowed for a more focused discussion on issues and requirements. Outcomes from the workshop provided valuable information and direction for the Project Team in identifying reporting improvements and candidate metrics.

Best practice

An initial set of guiding principles was provided within the Project Brief. These were reviewed and expanded upon to ensure that consideration was given to all stakeholders including the DCC, Users, Ofgem and Consumers. These principles were used by the Project Team to provide guidance, particularly in the early stages of the project.

A Stakeholder Map and Communications Plan were key to ensuring that the project was engaging with the right people at the right time and in the right way during the Project. Stakeholders included OPSG members, the DCC, Ofgem and all SEC Parties. Communication was maintained through regular reporting, conference calls, and newsletters to engage, satisfy and inform stakeholders.

The project was resourced and managed by SECAS, with the DCC joining the team to provide additional support. Whilst operational events limited the availability of DCC staff during the latter phase of the project, their initial engagement provided valuable support and expertise that benefited the Project Team.

3. Project Performance

3.1 Goals and Objectives

The objectives of the Project and performance against objectives are set out in the table below. The Project met all the objectives set, performing well in most areas. The trialling of candidate metrics was a useful activity although only two of the three planned trials were conducted. The Project had agreed that metrics already available via the Technical Operating Centre (TOC) would be used in the trialling and unfortunately the ones required for the third phase, estate health, were not available for the final phase.

Objective	Performance
To agree the purpose of Operational Metrics and agree a set of Guiding Principles. It is	Guiding principles defined during project establishment.

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envisaged that User business requirements will be a principal driver	
To identify requirements for Operational Metrics, using information from OPSG Members and the broader Smart Metering community	User requirements gathered via survey and refined during workshops.
To analyse the PMR Issues Log, rationalise entries where appropriate and prioritise the resulting list	PMR issues log fully reviewed. Worked with the DCC to close and clarify open issues. Final summary report issued to OPSG.
To identify new Key Metrics and improvements to existing metrics, including those that can be implemented quickly	Candidate metrics identified during 'Quick Wins and Trialling' phase in conjunction with the DCC. New and improved metrics were defined during the evaluation of outcomes.
To specify Operational Reports and agree with the DCC	The operational reports specification was led by the Project Team with feedback and metrics provided by the DCC for the trialling report. The Project devised a suggested format and layout for the PMR in the final report.
To agree a plan with the DCC to trial a subset of the new metrics	A trialling plan was agreed by the DCC and also by OPSG members that would be taking part in the trial.
To trial a defined set of improved metrics	The trialling plan was ambitious but the Project Team successfully issued and collated feedback on two trial cycles. A planned third cycle was cancelled as operational metrics were not available.
To produce an Operational Metrics report for the SEC Panel with recommendations and a plan for next steps	A final Report containing findings and recommendations was issued to SEC Panel on 17 April 2020 with all 29 recommendations accepted. Prior to issue, the Report had been reviewed by OPSG members and SEC Parties with feedback being used to make updates and improvements to the final Report.
To ensure OPSG is fully engaged with the project work	The OPSG was fully engaged throughout the project. OPSG members had the opportunity to participate through the survey and workshops as well as during the monthly project reporting to OPSG. The project worked closely with individual OPSG members where there was specific advice available or particular business requirements.

3.2 Milestones and Deliverables Performance

The Project Brief identified interim products and formal deliverables to be produced by the Project. All interim products were mapped to product tasks, and all were delivered as outcomes of those tasks. The project formally documented the following main outcomes of the project:

Agreed Trialling Plan – This project deliverable was a culmination of the preliminary work undertaken to review the operational metrics, identify obvious candidates, gain insight from Users (through one-to-one sessions, surveys and an initial workshop) and engagement with the DCC. The plan set out the

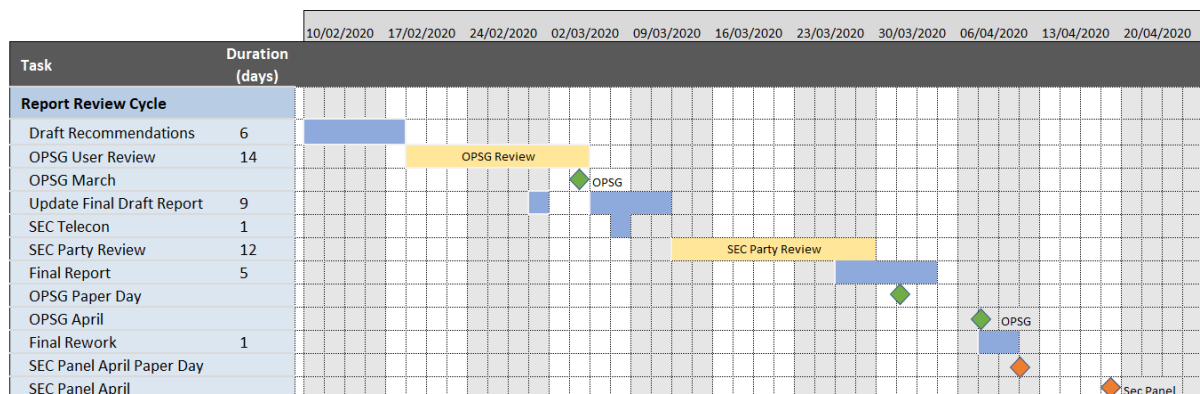
resource schedule for the trialling tasks, the approach for implementing the improved metrics and the criteria for evaluation of the results. The plan was approved by the OPSG on 7 January 2020.

PMR Issue Log Summary Report – A summary of issues recorded in the log and identification of overarching themes. Issues concerning both code performance and service provider performance are included, with special attention given to high impact issues and those with multiple occurrences. The issue log summary report was presented to the OPSG Reporting meeting on 23 March 2020 and included with the final report to OPSG on 7 April 2020.

Final Report – A final report was produced marking the culmination of the project. The report evaluated the outcomes from the PMR and issue log reviews, user survey results, user workshops and evaluation of trialling metrics to recommend improvements to operational metrics. The project made 29 recommendations that would require change either by SEC modification or action by the OPSG and the DCC. All recommendations were endorsed by the OPSG on 7 April 2020 and approved by the SEC Panel on 17 April 2020.

3.3 Schedule Performance

The initial schedule detailed within the PID aimed for the delivery of the final Report on 21 February 2020. It became clear during initial phases of the project that, due to resource availability and additional effort required for the full review of the final Report, this initial date could not be achieved. A subsequent re-plan identified a delivery date aligned with submission of the final Report to SEC Panel in April 2020. This plan for the review cycle (below) provided for an additional review by SEC Parties that had not been factored into the original plan and allowed for more feedback and a better quality of final product.



During this review phase, the Project Team received a large amount of feedback from Parties. All feedback was addressed and either incorporated into the final Report, or rationale provided for not including within the report. The volume of feedback led to some short delays in meeting milestones.

3.4 Budget Performance

The Project went over budget by approximately 30% due to the demanding scope and schedule that required additional tasks and effort. In particular, the trialling of metrics required more effort than originally planned and more effort was required for the drafting and rework of the final Report.

3.5 Risk Management

An active risk register was maintained for the duration of the Project. All risks were assessed and scored in line with best practice, and mitigations applied where possible. Risks were actively managed and key risks were reported monthly to OPSG.

The biggest risk identified was in meeting the initial February 2020 delivery date, which would impact on Users' ability to thoroughly review and feedback on the final Report. This was mitigated by re-planning for an April delivery date thereby allowing time for OPSG members and SEC Parties to review the final Report.

The Project also raised a risk that the voluntary contribution provided to the Project by the DCC would be impacted by operational tasks. This became an issue in January 2020 when the DCC was unable to provide the anticipated level of input. Delaying the project was considered as a possible mitigation, but this was not possible due to the Ofgem OPR Review dependency.

4. Project Closure Tasks

The Project Closure Checklist has been used to identify and check off the project closure tasks.

Project Closure Checklist						
Project Name		Operational Metrics Review (DCC)				
Project Manager		Damian Bevan				
Work Completion Target Date		21/02/2020		Actual Completion Date		
Closure Target Date		02/06/2020		Actual Closure Date		
ID	Description	Deliverable(s)	Deliver To	Owner	Complete (Y/N)	Completion date
1	All outstanding tasks completed.	All tasks completed (with exception of presentation to OPSG on July 02 2020).			Y	24/05/20
2	Outstanding issues have been documented and resolved.	All issues resolved			Y	07/04/20
3	Outstanding risks mitigated.	All project risks mitigated and closed			Y	07/04/20
4	Lessons Learned review complete and documented.	2 lessons learned sessions held. Outcome documented and passed to SECAS.	SECAS	Abi Harmon	Y	24/05/20
5	Project documentation finalised and saved in agreed appropriate place in accordance with agreed company data retention policies	Team folder zip copied to G drive	SECAS	Abi Harmon	Y	24/05/20
6	SoW requirements met.	Requirements met			Y	24/05/20
7	Feedback from stakeholders received and documented. (DCC, OPSG etc.)	Survey circulated and feedback collated.			Y	21/05/20
8	End users have been trained where required. (Briefing to mods/change team)	Change team briefed and project team assisted in creation of DP122	Change Team	Joe Hehir	Y	01/04/20
9	Measures for project success have been assessed and communicated.	All objectives and deliverables from PID complete. Closure report details success.			Y	24/05/20
10	Project team have been evaluated and relieved of their duties.	Project team have been reassigned and will be officially relieved on project closure.				
11	Knowledge transfer and handover for project maintenance is assigned to Product Owner. Approved by Panel. Joey M becomes owner of report.	Final report approved by SEC panel. Joey Manners (SECAS) will become owner of the report.	SECAS	Joey Manners	Y	24/05/20
12	Formal Project Board project closure meeting held. Presentation of final session to OPSG.	Closure report to be issued to June OPSG and Damian Bevan to present	OPSG	Damian Bevan	Y	24/05/20
13	Project evaluation signed off by Project Sponsor, i.e. formal recognition of the completion of the project - management sign-off.	Project sponsor has provided project assessment and feedback during lessons learned. Sign off expected following closure report acceptance by OPSG	Project Sponsor	Dave Warner		

The two remaining activities to relieve all Project Team members and formally sign off completion of the project will be completed by the final presentation and acceptance by OPSG on 02 June 2020.

4.1 Lessons Learned

The Project Team along with the Project Sponsor held a Lessons Learned session to assess the success of the project and identify areas that went well and those that could be improved. A summary of the Lessons Learned Log is provided within the table below:

Project Phase	What Went Well	What didn't go well	What can be improved
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Initiation	Team mobilised well and quickly. Good input at the start which assisted initiation.	Resource issue meant slow start	Plan resource requirements better
Planning	Project schedule kept up to date and communicated to stakeholders.	Project was complex and required full time resource allocation. Project went over budget when there may have been scope for amending the budget earlier.	Earlier input into planning by project team to understand/ assess the demand of the project (challenges). Better understanding of future state requirement and correlation of budget vs effort required to deliver.
Execution	Engagement with users through survey and workshops with good response and participation.	Not enough lead time for Users to attend the first workshop.	Better forward planning and earlier communication with Users.
Monitoring and Controlling	Making use of a weekly project cost vs accomplishment measure provided stakeholders with valuable insight into how the project was performing.	Cost vs Accomplishment is not part of the SECAS project management framework. Need to understand what good looks like and how it can be achieved.	Cost vs Accomplishment templates should be developed to assist future SECAS projects.
Closing	The extra work put in to generate the final Report was worthwhile and produced the desired result.	Some deadlines missed for interim reports, which impacted feedback quality from the OPSG. Report lacked the level of detail in all areas which was envisioned at the outset; more specifics on metrics should have been provided. First draft of the last version was not up to standard, considering the extent and complexity of the recommendations. More resource was used for the QA and report than anticipated.	Clearer communication to team regarding the paper being sent immediately. Allocate more time to focus on upcoming aspects of the project. Allow more time and resource to prepare the final Report.
Throughout Project	Contact with Ofgem was well-maintained and they were sympathetic to the project goals. Reasonable set of guiding principles set out early on, and provided value.	DCC resource availability was a false project assumption which negatively impacted delivery in initiation & execution phases. Principles under-utilised during the project. Project team didn't see the principles mapped against the final product. The principles should be	Include committed resource from the start of the project formally. Key stakeholders were distracted by other demands having to take priority. Alternatively, delay the project until resources are readily available. A more explicit mapping against the principles towards project end would and in the

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		referred to throughout the Project.	final Report would have been valuable.
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4.2 Feedback

A project Closure Survey was issued to OPSG members for completion. Three responses were received by the closing date with feedback summarised below:

Survey Question	Average Score (1 = poor / 10 = Excellent)
How engaged and supported by the SECAS Project Team did you feel?	8.3
Did the final project Report meet your expectations?	7.6
Overall, how happy were you with the delivery by SECAS, of the project?	8.0

Additional Comment:

"I think that there was a lot of engagement from SECAS with all of industry and the SEC Ops Group were kept well informed and involved throughout."

"Good regular updates"

"Overall, the project performed very well at communication and keeping users engaged. For future areas of improvement, it would have been useful to use a test area that also involved DNO's as part of the pilot reports. This would have helped improve engagement and expectations."

5. Recommendations

The OPSG is invited to **NOTE** the contents of this paper and **APPROVE** formal closure of the project.

Damian Bevan

Project Lead, Operational Metrics Review Project

26 May 2020

Appendices:

- **Appendix A:** OMR Project Closure: OPSG Chair's Comments