MHHS PROGRAMME

Benefits Realisation Plan

24 March 2022	v0.1	Internal Only	18 May 2022	v0.5	Internal Only
30 March 2022	v0.2	Internal Only	27 May 2022	v0.6	External
4 April 2022	v0.3	Internal Only			
14 April 2022	v0.4	Internal Only			

Contents

No.	Item for discussion
1	Scope and Methodology
2	Roadmap of Programme Outcomes, Deliverables and Monitoring Activities
3	Next Steps for Defining and Managing Programme Success
4	Reporting
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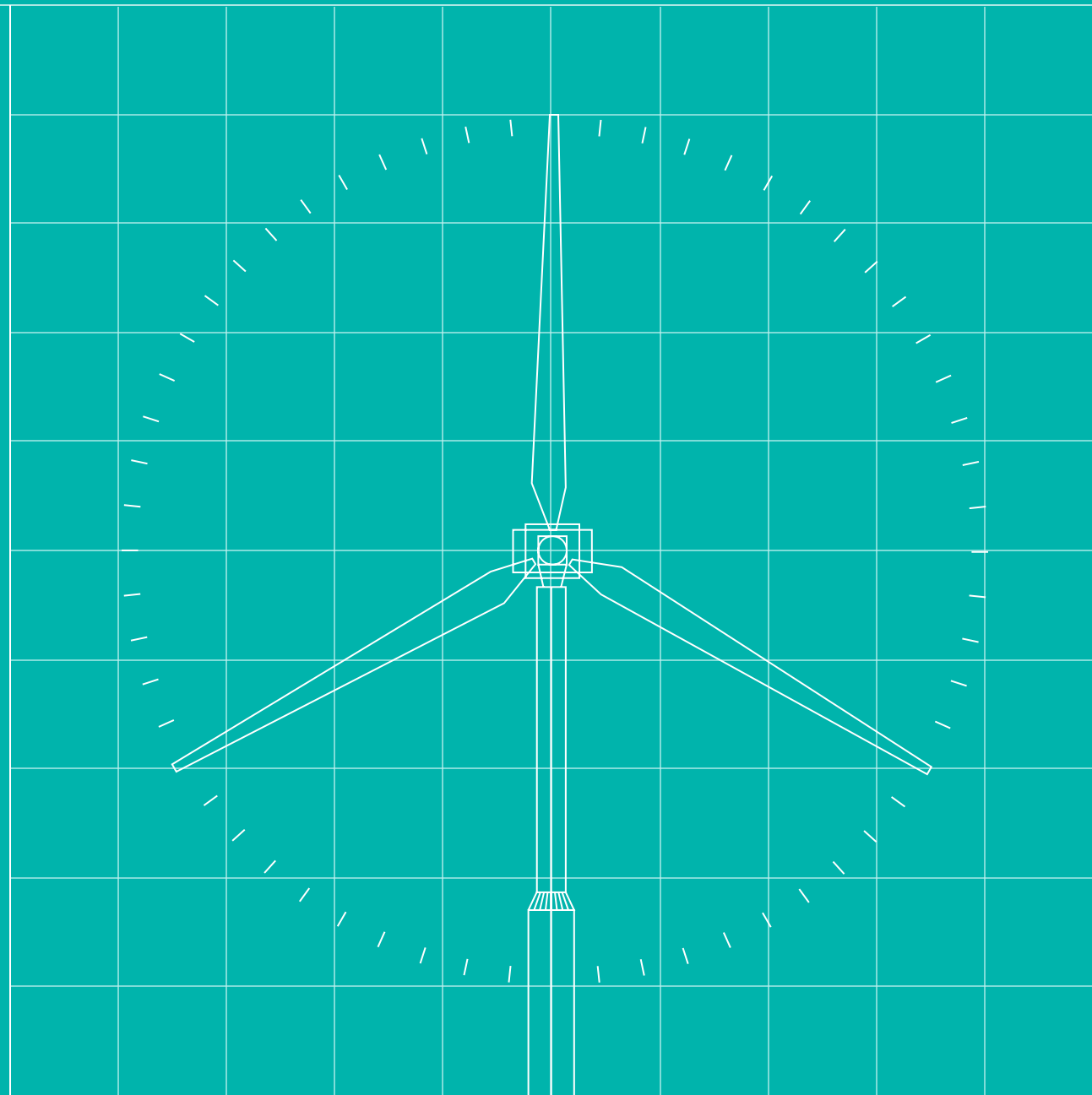
Scope and Methodology



Context, Background and Scope

- In considering how the MHHS Programme realises benefits, we started by looking at the benefits from the Ofgem Business Case and Final Impact Assessment [see Appendix] and identifying what the Programme will deliver to realise these benefits
- As set out in the Appendix, these benefits are generally expected to be realised by industry after the Programme has been successfully completed and the delivery of these benefits will need to be monitored after the Programme, which we expect to be the responsibility of Ofgem
- **The Programme must deliver the outputs, capabilities and outcomes that enable these industry benefits to be realised, and therefore in this document we have focused on identifying when and how these Key Programme Outcomes will be delivered and monitored**
- The LDP is responsible for the delivery, monitoring and reporting of Key Programme Outcomes
- The Programme Initiation Document (PID) sets out the framework and charter for the overall delivery of the Programme and includes the Key Programme Outcomes mapped to Success Criteria and Success Measures, as can be seen in the next slide. The PID establishes 10 Control Points through the Programme to maintain focus on the successful delivery of Key Programme Outcomes
- We have used the 17 Success Measures set out in the PID as our starting point since this is an agreed baseline. We have enhanced these measures, defined how we will demonstrate their achievement and established interim outcomes and monitoring to build confidence of their achievement through the lifetime of the programme
- The measurement of consumer engagement in the Programme is reflected in successful ongoing consumer representation and input into the Programme through Citizens Advice. Direct monitoring of consumer satisfaction is outside the scope of the Programme as an Ofgem responsibility
- This plan will evolve as the Programme progresses and will be subject to iterative development

6

Key Programme Outcomes

17

Success Measures

1

Proposed Additional Success Measure

PID Deliverables, Outcomes, Capabilities & Benefits – How the programme enables benefits and measures programme success

Benefits

Success Measures (to be further quantified)

1. Delivered within programme budget
2. Ofgem escalations, and material IPA and Elexon SRO raised items resolved
3. Level 1 milestones met
4. No major Hypercare issues without agreed work-off plans
5. Programme outcomes met with low variance in costs or timing
6. MPANs moved, disincentives & contingencies in place for non-moved MPANs
7. Settlement figures reconcile
8. No adverse impact on Industry Codes
9. Legacy systems decommissioned
10. Reduced no. of settlement runs
11. Reduced industry costs
12. Increased financial certainty for parties
13. Earlier financial certainty and reduced settlement risk from earlier final reconciliation at 4 months rather than 14 months
14. Clear and efficient qualification process
15. New market services, new tariff offerings, new entrant agents
16. Elexon PAB approve use of new settlement timetable and settlement run-off plan
17. Positive periodic surveys and results of bilateral meetings, including Citizens Advice
18. Design captured coherently and accurately in accordance with the TOM and tested

Success Criteria

- Business case met
- Schedule met
- Design requirements appropriate / met
- Design proven to central parties and a critical number of industry parties
- No business disruption
- All parties have adopted cutover
- Reduced costs of systems' future changes
- Modifications to the Balancing and Settlement Code implemented
- Generators & Suppliers able to resolve financial uncertainty quicker
- All market participants confident to operate within new model, supported by the Kinnect platform
- New market model in place
- Platform to enable innovation in energy service and business models
- Reduced cost to serve
- Parties feel represented & included
- Citizens Advice successfully engaged to provide input to represent consumers
- Industry-led delivery model proven to be better

Key Programme Outcomes

- Delivered to time, cost, quality
- Migrated to MHHS by Oct 2025
- Reduced cost / improved accuracy of settlement delivery
- Improved experience for BSC parties
- More cost effective & efficient service
- Stakeholders engaged & satisfied

Key Programme Outputs (Deliverables) & Capabilities

- Physical Design
- Code Changes
- Data Integration Platform
- Event-driven architecture
- Tested changes to Central Party Systems
- Tested changes to the DTN
- Tested TOM Data & Metering Services
- All MPANs migrated
- Services to support new Settlement Timetable
- Decommissioned legacy capabilities

MHHS PROGRAMME

Highlighted text shows where the original PID measures and criteria have been enhanced through this work on Programme Outcomes

- We have taken the 17 Success Measures listed from the PID slide above and considered which Final Programme Outcome(s) and Deliverables from the MSA - Schedule 2 would mark the successful achievement of each of these Success Measures
- We have then set quantifiable criteria against the Final Outcome(s) and Deliverables to quantify the successful achievement of each of the 17 Success Measures
- We have then considered which Programme Outcome(s) and Deliverables contribute towards the final achievement of each Success Measure so that we can measure and monitor successful progress towards the Final Outcome(s)
- One of the 17 Success Measures is 'Level 1 milestones met' and, by definition, all Programme Outcomes and Deliverables will be delivered by level 1 milestone achievement. We have looked to assign all the Programme Outcomes and Deliverables to one of the other Success Measures where we can to demonstrate incremental achievement of Success Measures over the course of the Programme
- We have then considered how the delivery of each Programme Outcome and Deliverable is currently being / will be measured and monitored over the duration of the Programme
- We have also considered what monitoring is required to demonstrate the achievement of the Success Measures over and above Programme Outcomes and Deliverables
- Any dates and milestones will be subject to the planned programme replan and the consideration of later migration and transition activities

Recommendation from our Analysis

- We have identified that the robustness of the design is a key element that has been lost through the Success Measures included in the PID, meaning that all the M5 Programme Outcomes and Deliverables relating to design were originally allocated to Success Measure 3, 'Level 1 milestones met'
- We have added **'Design captured coherently and accurately in accordance with the TOM and tested'** to the PID Success Measures and allocated all relevant M5 Programme Outcomes and Deliverables relating to design to this Success Measure
- We recommend that this Success Measure is added to the PID slides

Quantifying Achievement of Success Measures (1 of 4)

Key Programme Outcome	Success Measure	Quantified Achievement of Success Measure	Final Measurement	Interim Monitoring
Delivered to time, cost, quality	1. Delivered within programme budget	• Final programme exit approved with expenditure within agreed tolerance • Focus on delivering to cost	End of M16	• Fortnightly financial reporting, quantitively monitoring actual spend v. budget for the LDP (PMO) • Monthly financial reporting to the Elexon Board (Elexon SRO/IM) • Financial Dashboard reporting to PSG on a monthly basis (Elexon SRO/IM)
	2. Ofgem escalations, and material IPA and Elexon SRO raised items resolved	• No unresolved material issues raised from Elexon SRO/IM to LDP • No unresolved Ofgem escalations (material changes to TOM, >3 month delay, £5m individual cost variance or £20m cumulative cost variance) • No unresolved material issues raised from IPA to LDP • Focus on delivering to quality	End of M16	• All material issues from the Elexon SRO/IM, Ofgem and IPA addressed – criterion applies at all milestones • *Create a log of all material issues from the Elexon SRO/IM, Ofgem and IPA* • PMO to report weekly on the status of Ofgem escalations, and material IPA and Elexon SRO raised items
	3. Level 1 milestones met	• 100% of level 1 milestones met with all outcomes / acceptance criteria met and deliverables approved • Focus on delivering to time and quality	End of M16	• PMO reports weekly on the status of every outcome and deliverable from Schedule 2 of the MSA for upcoming milestone(s), and any activities outstanding from previous milestone(s)
	4. No major Hypercare issues without agreed work-off plans	• No 'Severity 1' and 'Severity 2' hypercare incidents outstanding at the end of the programme without agreed work-off plans, with any other outstanding defects within agreed exit criteria defect mask limits • Focus on delivering to quality	End of M16	• *E2E Test Strategy to include entry and exit criteria principles* • *Test approach and plans to include explicit defect mask limits for each stage of testing* • *Test Completion Reports to report within defined defect mask limits* • *Note that these interim monitoring activities will be used as supporting activities to build confidence throughout the programme, rather than directly measuring hypercare*
	5. Programme outcomes met with low variance in costs or timing	• Final programme exit approved with cost and timing within agreed tolerance	End of M16	• *Fortnightly financial reporting – 'earned value' reporting* • PMO reports weekly on the status of every outcome and deliverable from Schedule 2 of the MSA for upcoming milestone(s), and any activities outstanding from previous milestone(s)

Quantifying Achievement of Success Measures (2 of 4)

Key Programme Outcome	Success Measure	Quantified Achievement of Success Measure	Final Measurement	Interim Monitoring
Migrated to MHHS by Oct 2025	6. MPANs moved, disincentives & contingencies in place for non-moved MPANs	• 100% of meter points migrated in line with the Migration Strategy and exit criteria from programme phases • All meter points migrated and operating under the new arrangements (existing programme outcome)	M15	• *Migration Strategy, Approach and Plan to outline the criteria for successful completion of migration activities with disincentives and contingencies* • *Successful completion of Migration Testing to exit criteria (including any Migration Testing in qualification)*
	7. Settlement figures reconcile	• No material issues exist within Settlement reconciliation (part of existing programme outcome)	M16	• *Approach to testing settlement accuracy included in Testing and Migration Strategies, and affected approaches and plans to ensure exit criteria appropriately defined (e.g., from parallel running)*
	8. No adverse impact on Industry Codes	• No material Code defects at programme exit and all outstanding changes captured in Code Modifications or Change Requests	End of M16	• *Monitoring against plan for Code delivery (as per CR003 or re-plan output)* • *Approval of Code Changes at M6 and implementation at M8* • *Any material issues to be raised into RAID for monitoring and resolution*
Reduced cost / improved accuracy of settlement delivery	9. Legacy systems decommissioned	• Plan in place and agreed with Elexon to manage Settlement run-off arrangements (existing programme outcome)	M16	• *Timing of decommissioning of legacy systems to be a key criterion for approval of Settlement run-off arrangements*
	10. Reduced no. of settlement runs	• Following post implementation, new Settlement timetable working with no material issues – criteria to be defined by BSC PAB	End of M16	• Design milestone (M5) approved on time to cost and quality • *Test Completion Reports to report design defects within defined limits (zero 'Severity 1' and 'Severity 2' design defects)*
	11. Reduced industry costs	• Implementation programme benefits realisation process in place (we cannot quantify this within the programme, but we can set the framework for measuring it post-programme)	M16	• No interim monitoring activities
	12. Increased financial certainty for parties	• Following post implementation, new Settlement timetable working with no material issues – criteria to be defined by BSC PAB	End of M16	• Design milestone (M5) approved on time to cost and quality • *Test Completion Reports to report design defects within defined limits (zero 'Severity 1' and 'Severity 2' design defects)*

Quantifying Achievement of Success Measures (3 of 4)

Key Programme Outcome	Success Measure	Quantified Achievement of Success Measure	Final Measurement	Interim Monitoring
Improved experience for BSC parties	13. Earlier financial certainty and reduced settlement risk from earlier final reconciliation at 4 months rather than 14 months	• Following post implementation, new Settlement timetable working with no material issues – criteria to be defined by BSC PAB	End of M16	• Design milestone (M5) approved on time to cost and quality • *Test Completion Reports to report design defects within defined limits (zero 'Severity 1' and 'Severity 2' design defects)*
	14. Clear and efficient qualification process	• All MHHS Participants' Central Parties, Large Suppliers and at least 80% of other relevant MHHS Participants have successfully completed qualification testing, and any residual non-conformant Parties have been appropriately escalated in line with the MHHS Governance Framework (SI)	End of M14	• Gain confidence in the structure through approval of E2E Testing & Integration Strategy and Qualification Test Approach & Plan • *Approval of Code Changes at M6 and implementation at M8*
More cost effective & efficient service	15. New market services, new tariff offerings, new entrant agents	• Implementation programme benefits realisation process in place (we can't quantify this within the programme, but can set the framework for measuring it post-programme)	M16	• No interim monitoring activities
	16. Elexon PAB approve use of new settlement timetable and settlement run-off plan	• PAB approved use of new settlement timetable • Plan in place and agreed with Elexon to manage Settlement run-off arrangements (existing programme outcome)	M16	• *Suggest agreement of reporting format in advance, and populating and monitoring against target outcome in advance*
Stakeholders engaged & satisfied	17. Positive periodic surveys and results of bilateral meetings, including Citizens Advice	• IPA acceptance that the programme has taken reasonable endeavours to engage with programme parties, including Citizens Advice	M16	• Interim milestones contain an assessment of no outstanding IPA issues (as per Success Measure 2) • *To consider later metrics to monitor against beyond existing PPC outcomes (e.g., surveys) and to ensure measure of Citizens Advice input included (not just attendance at meetings)*

Quantifying Achievement of Success Measures (4 of 4)

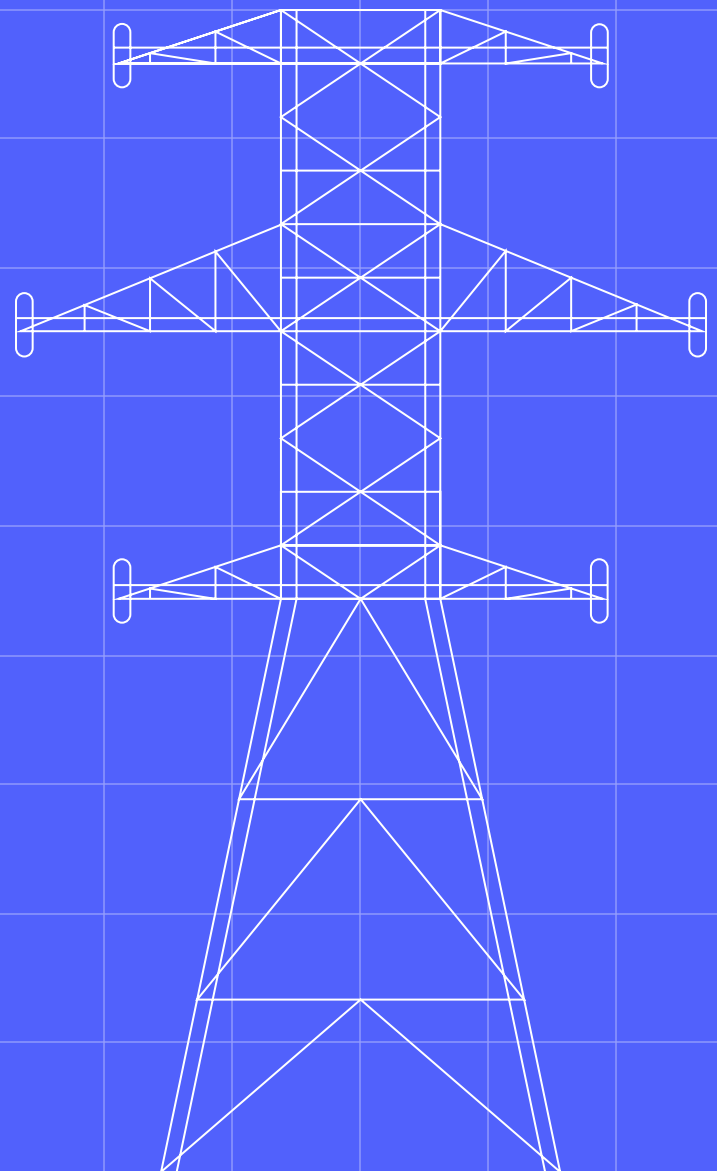
Key Programme Outcome	Success Measure	Quantified Achievement of Success Measure	Final Measurement	Interim Monitoring
Proposed additional success measure	18. Design captured coherently and accurately in accordance with the TOM and tested	• No 'Severity 1' and 'Severity 2' hypercare incidents outstanding at the end of the programme without agreed work-off plans, with any other outstanding defects within agreed exit criteria defect mask limits • No outstanding elements of the TOM undelivered (i.e. technical debt) unless outside the control of the Programme and with an Ofgem approved plan for resolution	M16	• Design milestone (M5) approved on time to cost and quality • *Test Completion Reports to report design defects within defined limits (zero 'Severity 1' and 'Severity 2' design defects)*

Interim Monitoring Key:

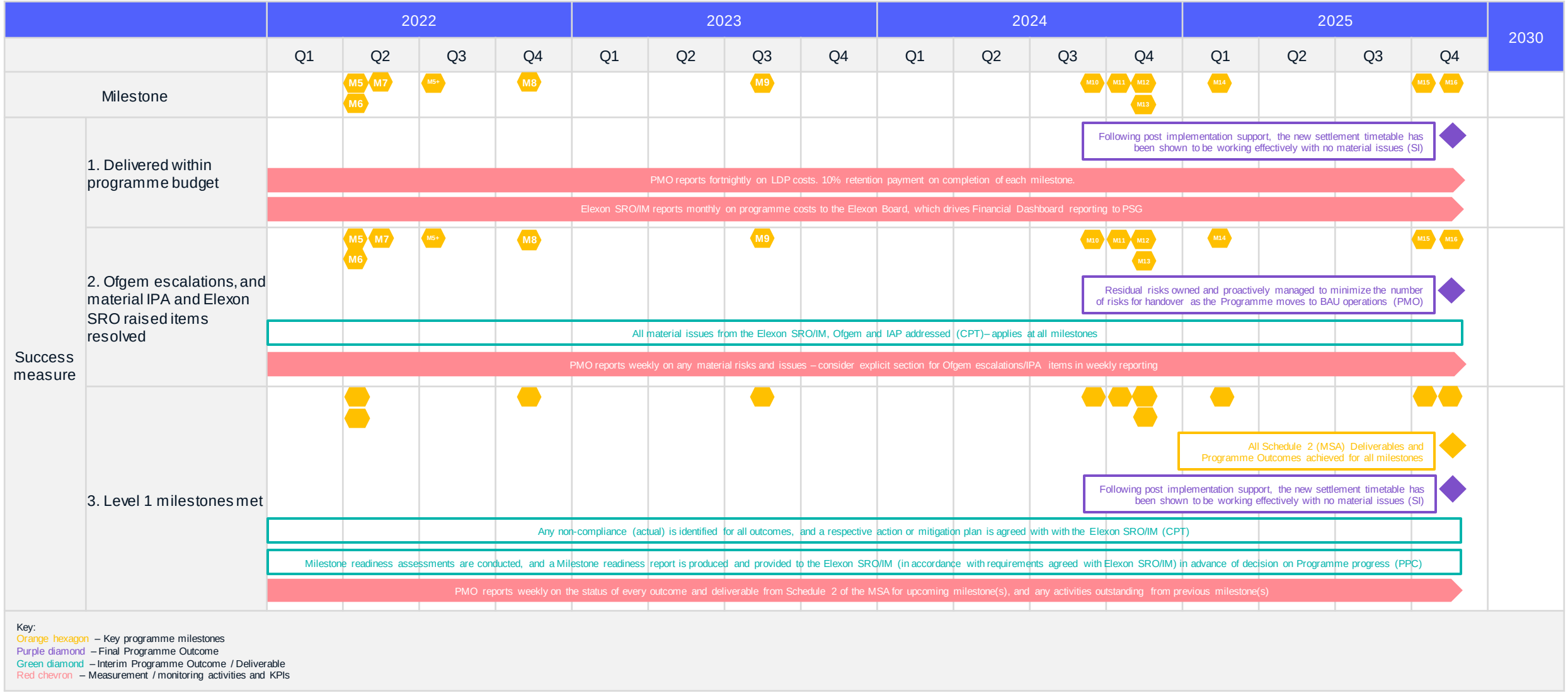
Italics – Future monitoring activities to be implemented

- Throughout the duration of the programme, we will monitor progress against these Success Measures to ensure we are on track to deliver them by the final measurement milestone
- The next set of slides show the Interim Programme Outcomes and Deliverables on a timeline, with these monitoring activities to outline the next level of granularity

Roadmap of Programme Outcomes, Deliverables and Monitoring Activities

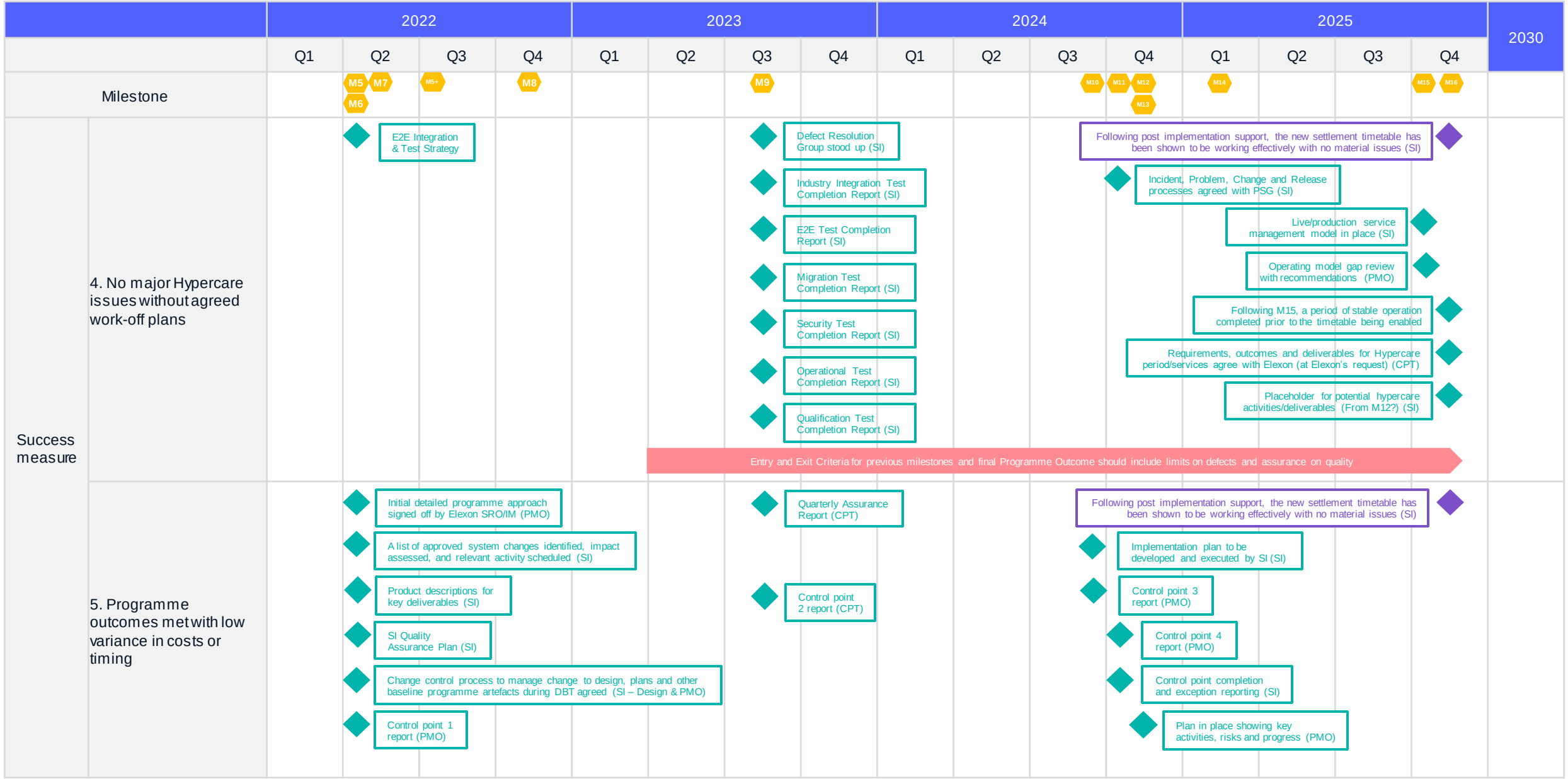


Roadmap of Programme Outcomes, Deliverables and Monitoring Activities (1 of 11)



Key:
Orange hexagon – Key programme milestones
Purple diamond – Final Programme Outcome
Green diamond – Interim Programme Outcome / Deliverable
Red chevron – Measurement / monitoring activities and KPIs

Roadmap of Programme Outcomes, Deliverables and Monitoring Activities (2 of 11)



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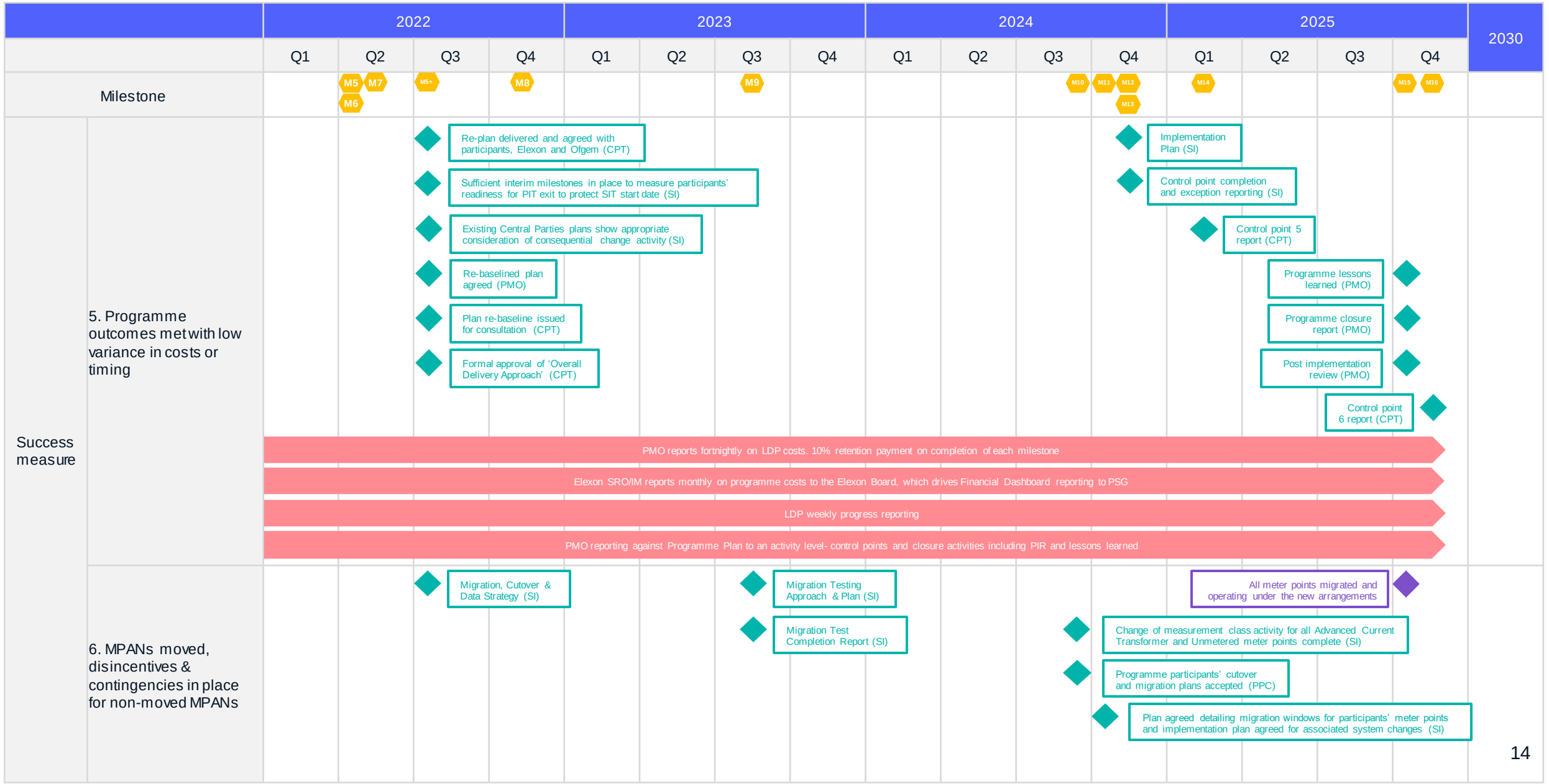
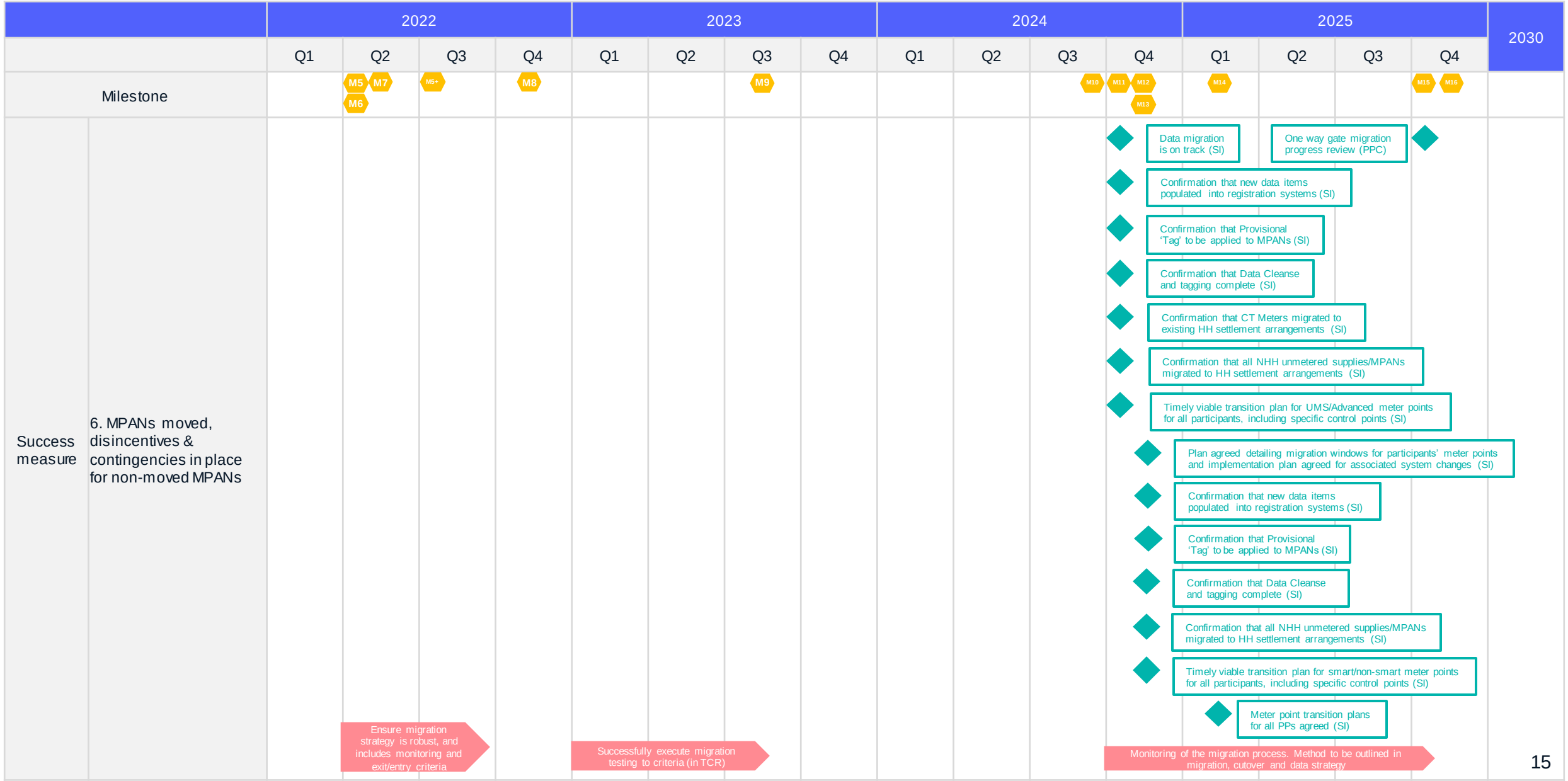
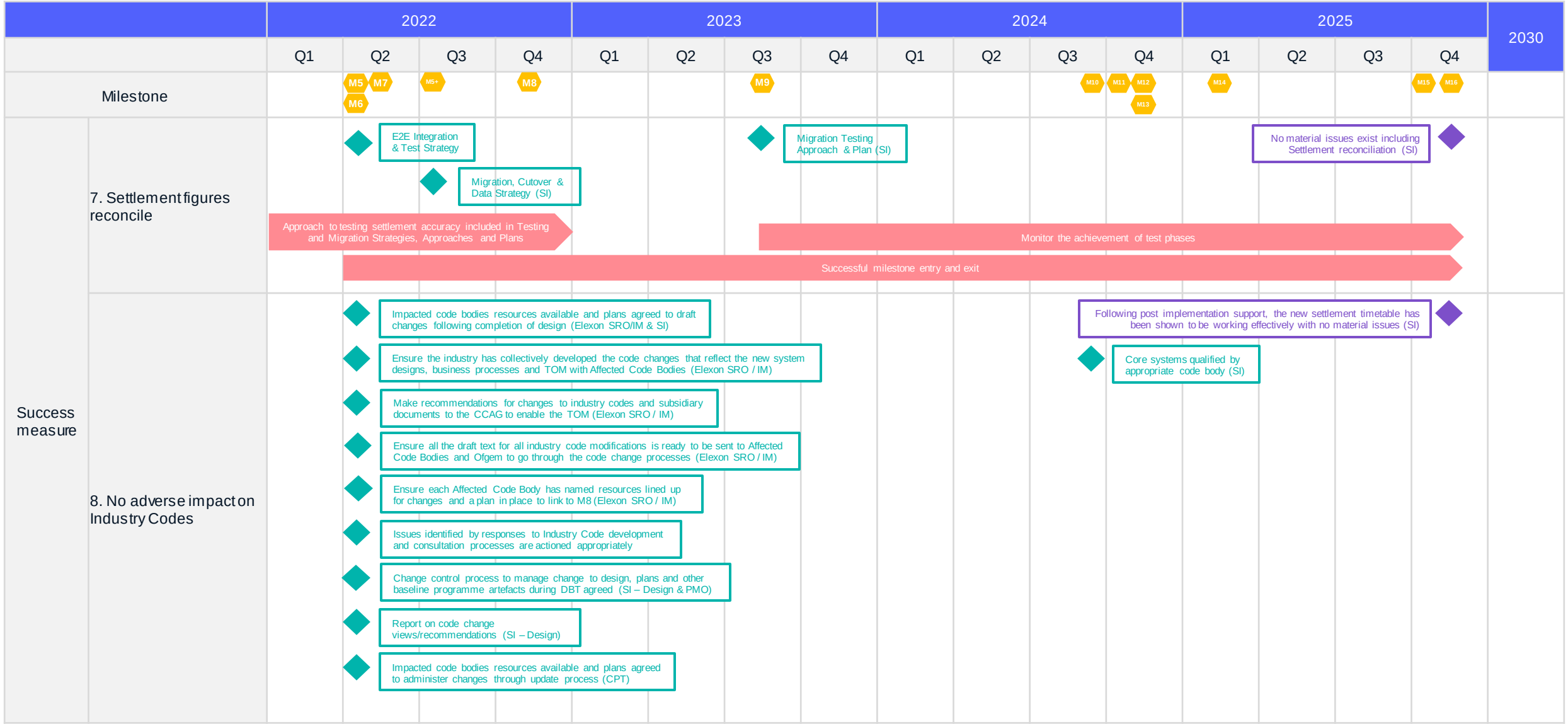


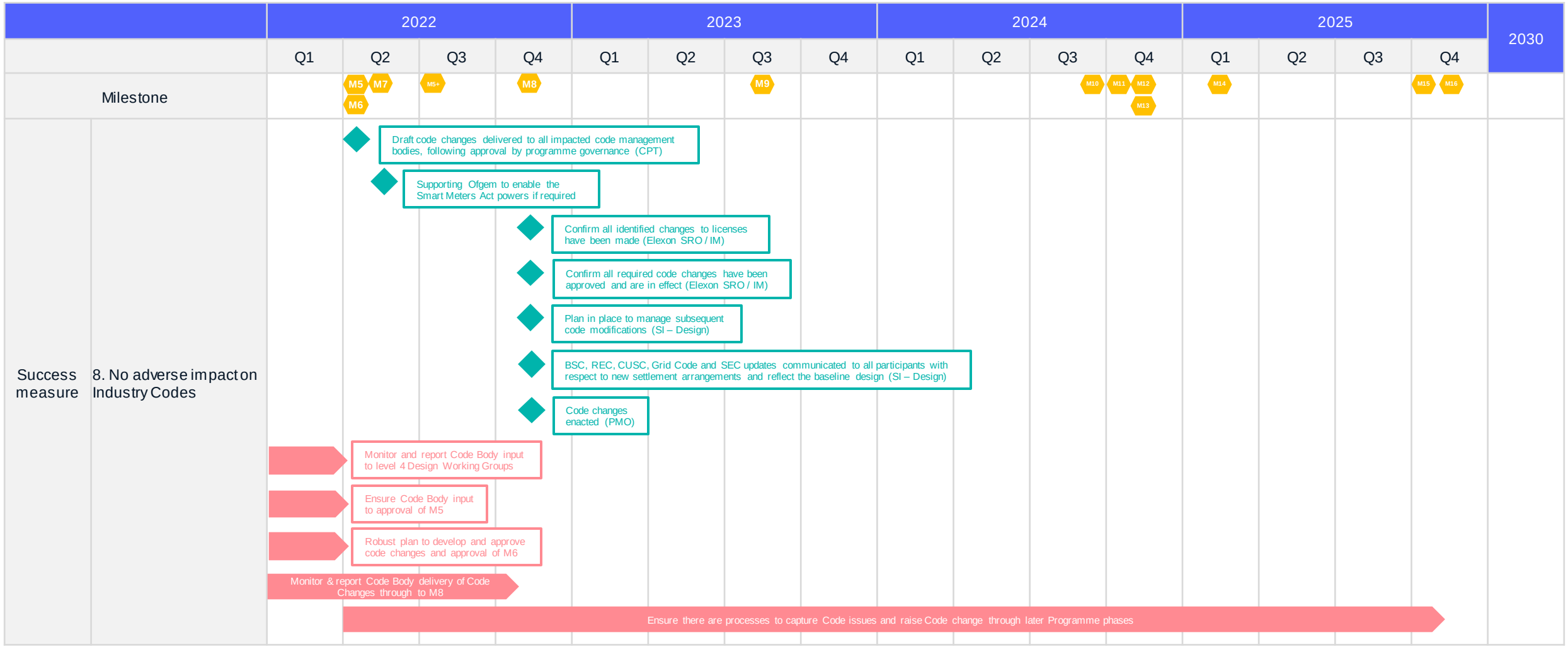
Roadmap of Programme Outcomes, Deliverables and Monitoring Activities (4 of 11)



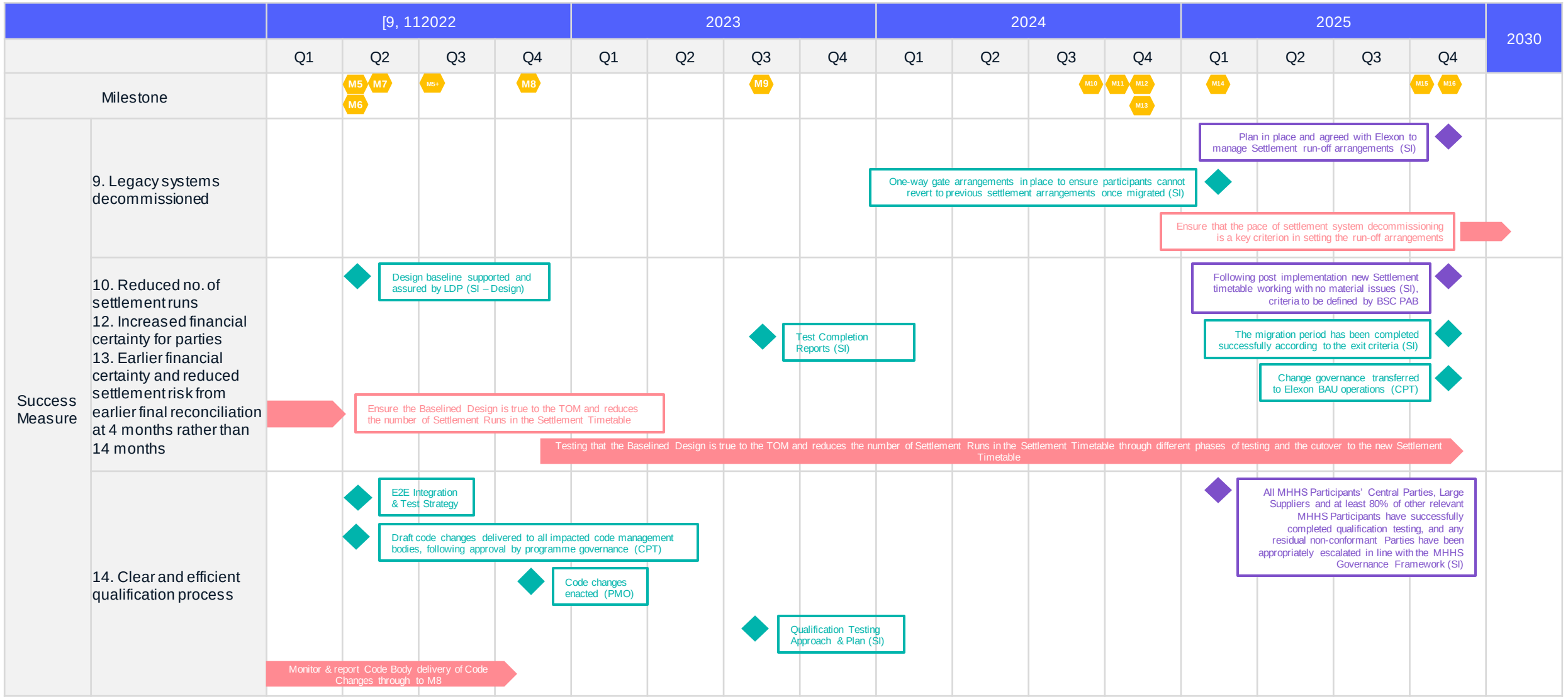
Roadmap of Programme Outcomes, Deliverables and Monitoring Activities (5 of 11)



Roadmap of Programme Outcomes, Deliverables and Monitoring Activities (6 of 11)

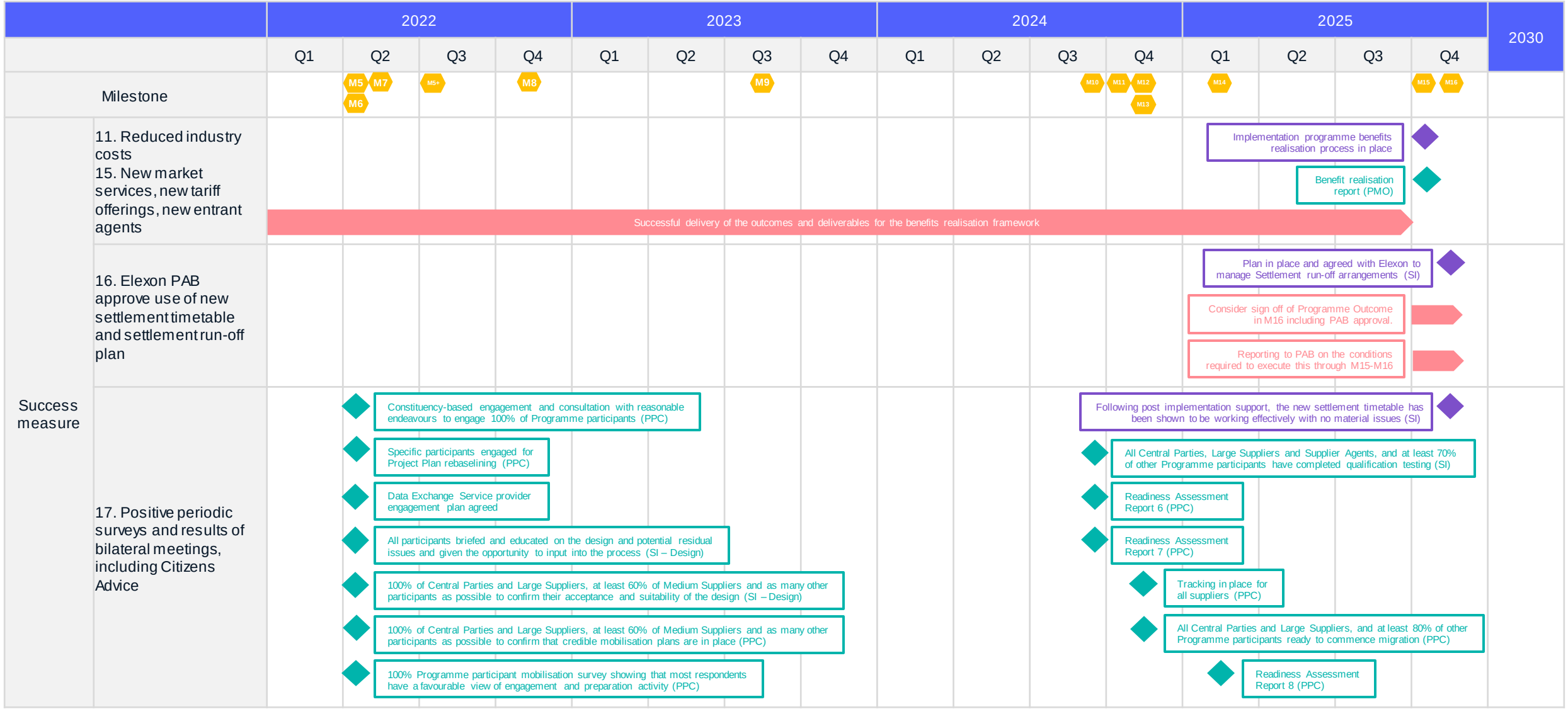


Roadmap of Programme Outcomes, Deliverables and Monitoring Activities (7 of 11)

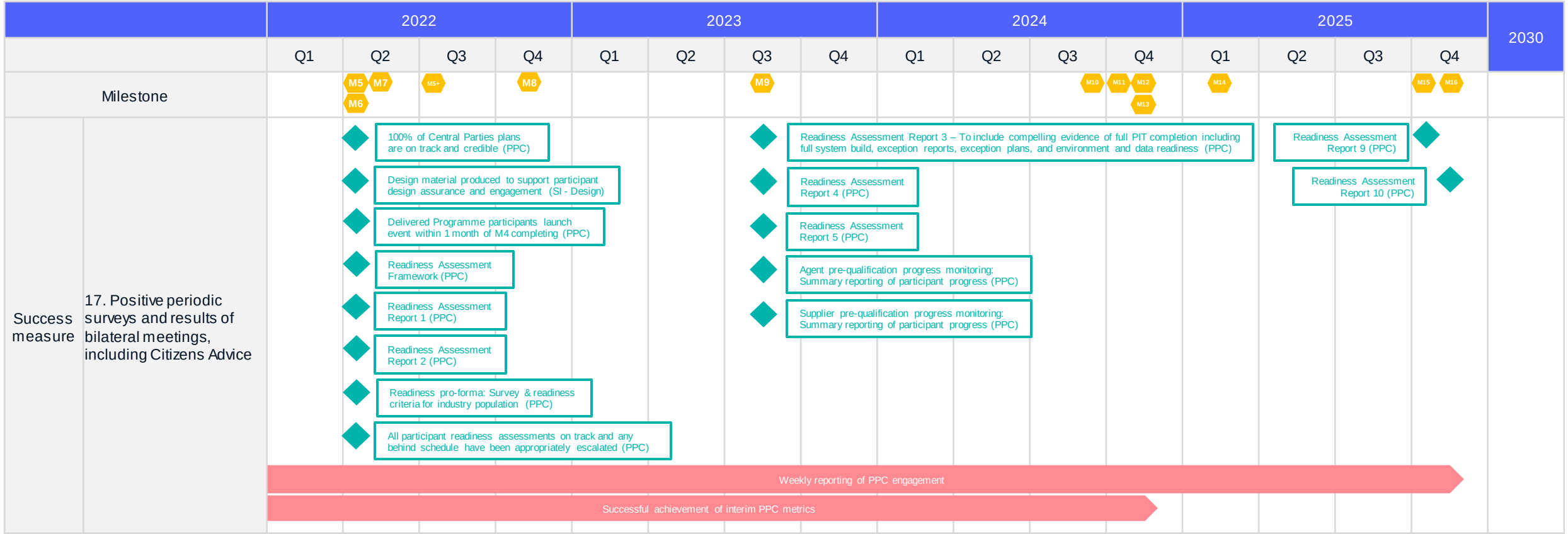


Success Measures 10, 12 and 13 have the same Final Programme Outcome, and Interim Programme Outcomes and Deliverables because they are all associated with implementing the new Settlement Timetable

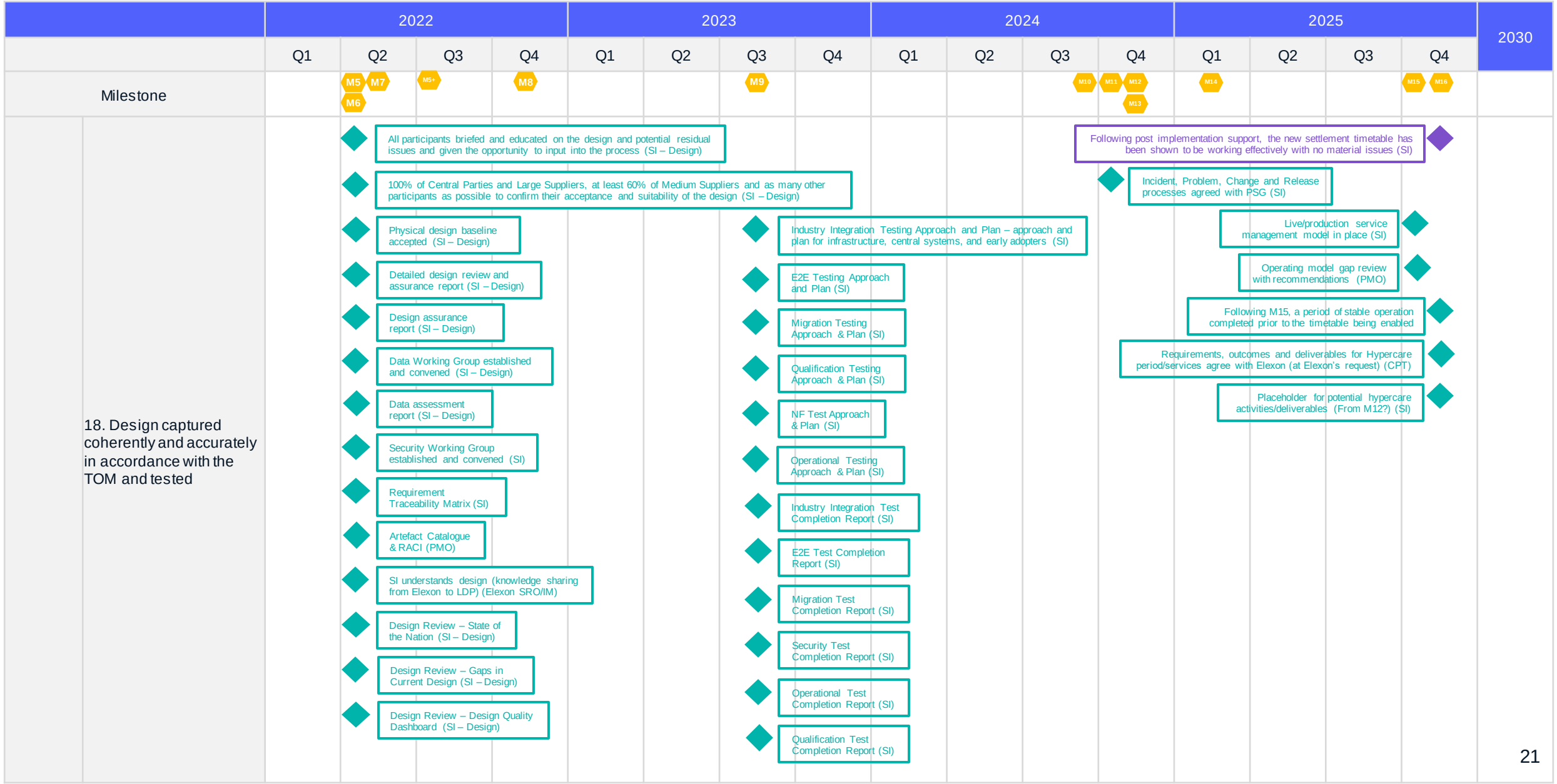
Roadmap of Programme Outcomes, Deliverables and Monitoring Activities (8 of 11)



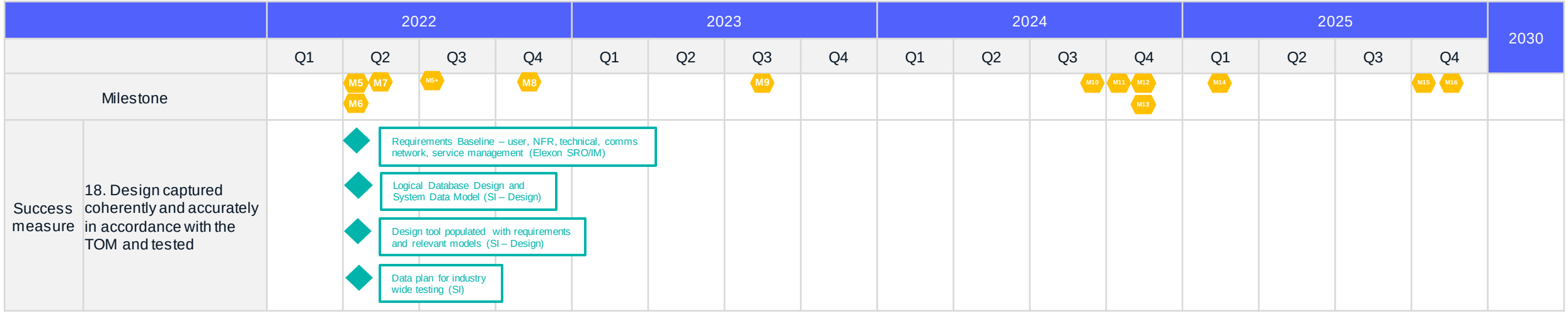
Roadmap of Programme Outcomes, Deliverables and Monitoring Activities (9 of 11)



Roadmap of Programme Outcomes, Deliverables and Monitoring Activities (10 of 11)



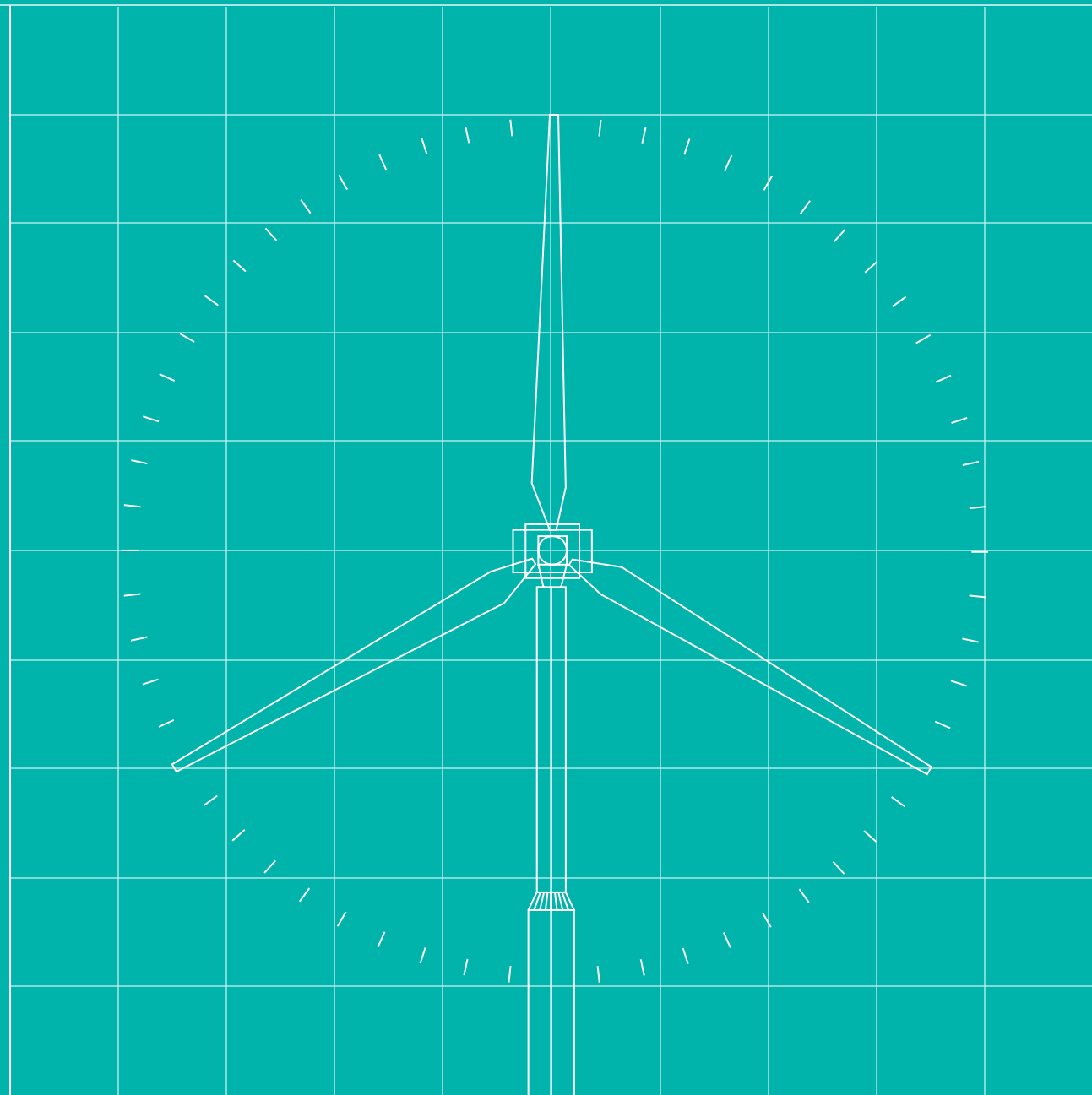
Roadmap of Programme Outcomes, Deliverables and Monitoring Activities (11 of 11)



Post-Programme Success Measures

- Success Measure 11, 'Reduced industry costs', has been included in the roadmap alongside Success Measure 15, 'New market services, new tariff offerings, new entrant agents'. However, given the nature of this Success Measure, its achievement will need to be monitored against the Ofgem Business Case and Final Impact Assessment post-programme, and therefore it has been added to the map of industry benefits [see Appendix]
- Next Step: To be reviewed and handed over to Ofgem for monitoring and delivery

Next Steps for Defining and Managing Programme Success



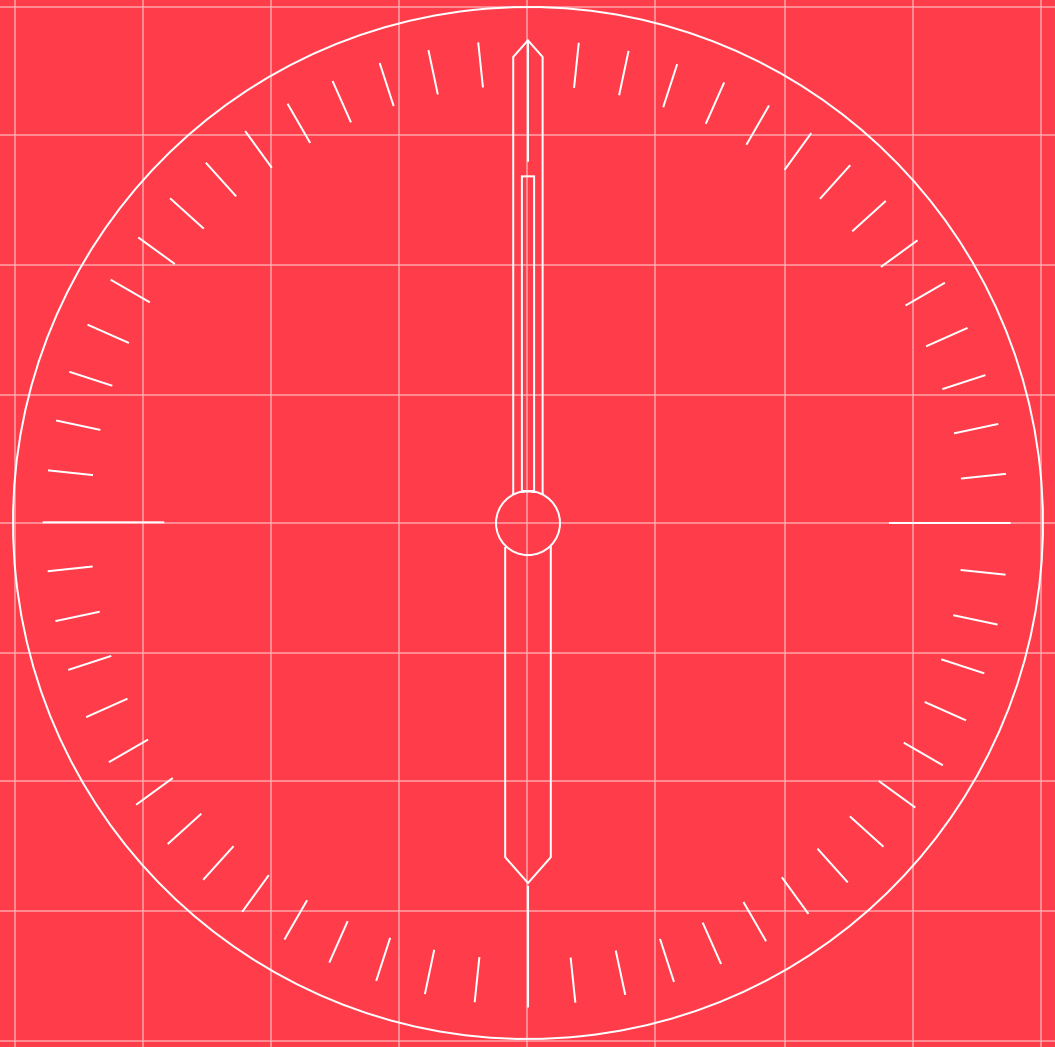
The following steps are already laid out in the PID and provide the mechanism for managing successful achievement of Programme Outcomes:

- A periodic Programme Strategy Review will be conducted:
  - To happen at each identified Control Point (as a minimum)
  - Will be chaired by MHHS SRO function (Programme Director)
  - To include the IPA and the results of the review will be reported to Ofgem and the PSG
  - Will include a full review of the PID and the associated strategies
- Reporting on the plan for (and progress towards) achievement of Key Programme Outcomes will be provided to the Elexon Board, Ofgem and the PSG

In addition to what is already set out in the PID, as part of the iterative development of the Benefits Realisation Plan, the MHHS Programme will:

- Include a full review of the milestone acceptance criteria in the strategy review
- Following agreement of this document, update the programme PMO tools and processes, e.g., RAID items, change control form updates to explicitly reference impact on Programme Outcomes, etc. to reflect the Key Programme Outcomes and associated Success Measures
- Ensure measure of Citizens Advice input included in monitoring (not just attendance at meetings)
- Consider how adaptability might be reflected in future programme outcome development as per the success criterion on enabling innovation
- Consider how to track change over the lifetime of the programme and how this might impact programme outcomes
- Consider what interim monitoring might be able to be put in place towards post-go live benefits realisation in Control Points

Reporting



Reporting

LDP Status Reporting

- A report tracking the status of each Programme Outcome and Deliverable for relevant milestones at that point in time is shared with the SRO at the end of each week
- Each Programme Outcome / Deliverable is rated as being either blue (outcome / deliverable fully realised), green (outcome / deliverable on track to be realised), amber (outcome / deliverable realisation off track against roadmap but mitigating actions for recovery agreed) or red (outcome / deliverable realisation off track against roadmap, without mitigating actions for recovery in place and / or escalation required)

Financial Reporting

- The PMO reports on the financial position of the LDP to the SRO on a fortnightly basis
- LDP costs are invoiced at 90% on a monthly basis. The remaining 10% is not invoiced until the SRO is satisfied that all Programme Outcomes and Deliverables for the relevant milestone have been successfully achieved
- The Elexon SRO/IM reports monthly on programme costs to the Elexon Board, which drives financial dashboard reporting to PSG

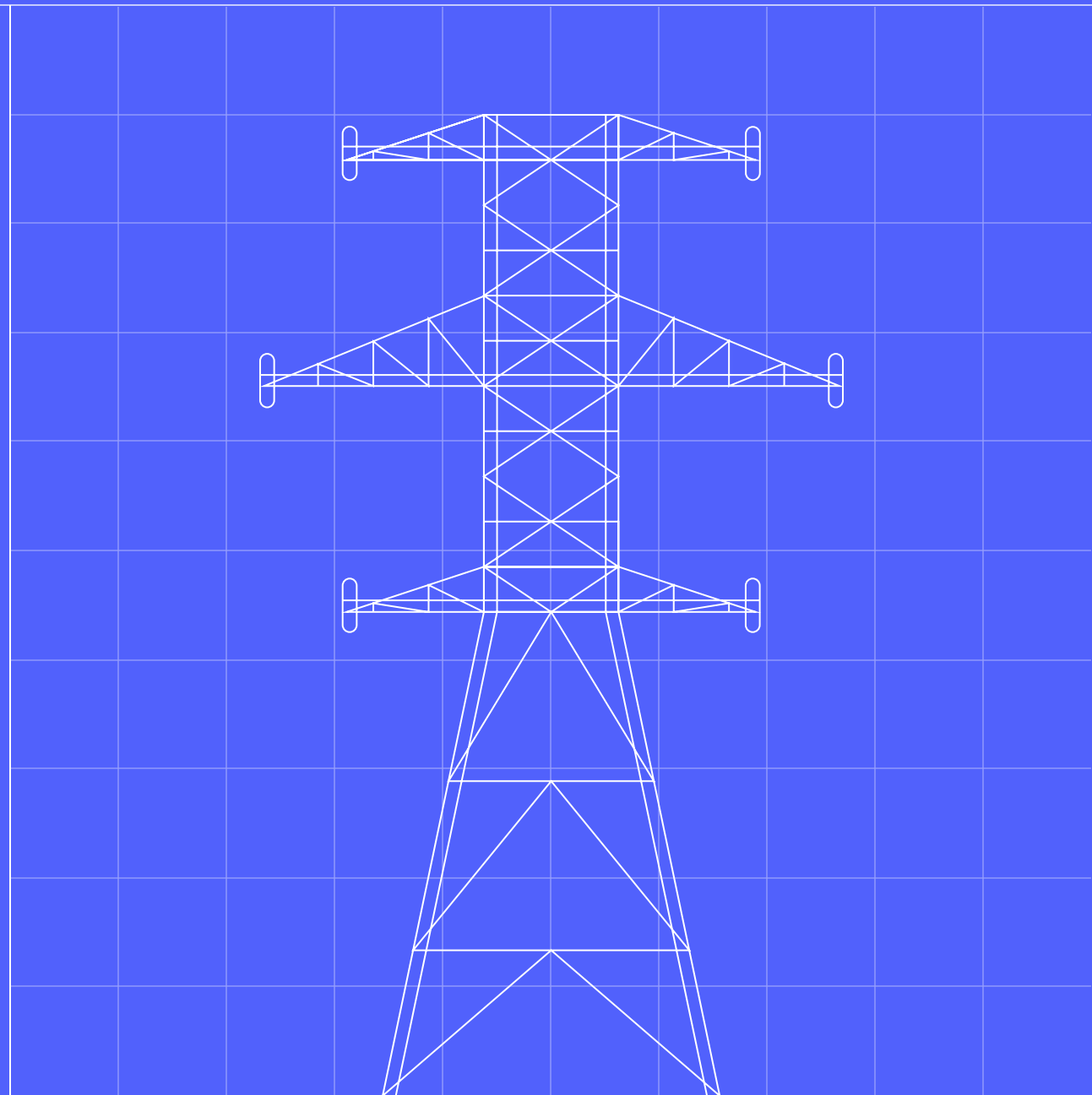
Readiness Assessment Reporting

- A report aggregating the responses from each readiness assessment submission received from industry is produced in line with the timelines set out in the MSA – Schedule 2
- Each report identifies the key themes and insights which enable the LDP to act to improve stakeholder engagement and ensure Programme participants are on track in terms of their delivery

PPC Insights Reporting

- PPC are in the process of finalising the format of a report which will be produced on a weekly and monthly basis to highlight and summarise the key stakeholder interactions the team are engaging in

Appendix



MHHS PROGRAMME

Deliverables, Outcomes, Capabilities & Benefits – Benefits that drive achievement of the vision

MHHS Vision

To develop and implement an enduring process for MHHS that delivers benefits for consumers by maximising the opportunities provided by smart metering in enabling an intelligent, flexible energy system by October 2025.

- Improve accuracy and frequency of cost information for suppliers
- Ensure future energy system is affordable for consumers
- Encourage more flexible use of energy
- Create powerful incentives for suppliers to offer new tariffs and products
- Support transition to net zero

Strategic Objectives

Source: Ofgem Outline Business Case - Market-wide Half Hourly Settlement

Benefits

Source: Ofgem Final Impact Assessment – Market-wide Half Hourly Settlement

Cost Saving Monetised Benefit | Non-Monetised Benefit

To promote an electricity system that delivers the Government's and Ofgem's objectives in a cost-effective manner, minimising the overall cost to current and future consumers of moving to a net zero carbon electricity system

System-wide welfare benefits from load shifting *£1,200m estimated cumulative direct benefits for low load shifting scenario and £3,550m for high load shifting scenario (2026-2045)*	**Better matching of supply and demand reduces the cost of managing imbalance positions** *£49m estimated cumulative cost saving (2026-2045)*	**Incentivising innovation** *Incentivise suppliers to manage the actual costs of providing energy to their customers more efficiently*	**Increased competition** *Exposing suppliers to the true cost of supply of their customers incentivises them to encourage load shifting, allowing for cost savings and a competitive advantage by offering new and innovative tariffs*
Benefits from including export-related MPANs *Mostly qualitative description*	**Reduction in cost of managing imbalance positions due to improved matching of supply and demand** *Several suppliers reported related cost savings amounting to £4.5m per year*	**Increased competition** *Remove barriers to entry for new market players by reducing the overall costs of the settlement process*	**Increased competition** *Enable new technologies and business models that capitalise on new market incentives, facilitating and incentivising load shifting and thus cost reduction*
More efficient qualification process for new entrants	**Fewer settlement errors and lower collateral requirements** *Promote a more accurate settlement process, with better quality data and fewer settlement errors*	**Fewer settlement errors and lower collateral requirements** *Reduction in supplier exposure and settlement collateral requirements, reducing market entry barriers*	

To develop settlement arrangements that incentivise all retailers and suppliers (current and future) to encourage customer behaviour that contributes to a more cost-effective electricity system

Consumer benefits (consumer surplus) from load shifting *£2,100m estimated cumulative direct benefits for low load shifting scenario and £5,050m for high load shifting scenario (2026-2045)*	**Incentivising innovation** *Incentivise consumers to find and switch to the right offering for them through digitalisation*	**Incentivising innovation** *Incentivise retailers to offer new energy tariff-only propositions, new third-party managed energy services, new bundled 'asset and tariff' offerings and more niche offerings that could be targeted at local communities*	**Incentivising innovation** *Incentivise third parties offering price comparison tools to provide a more comprehensive service, considering the electrical appliances and other assets a consumer owns and tailoring the service to the consumer's requirements*

To support Ofgem's aim to enable a future retail market that can deliver the technological and behavioural changes needed to support decarbonisation at lowest cost, while ensuring that the interests of consumers remain protected

Reduced carbon costs driven by a reduction in carbon emissions due to higher proportion of renewables in generation mix *£100m estimated cumulative carbon cost savings for low load shifting scenario and £1,250 for high load shifting scenario (2025-2045)*

Benefits enabled by the MHHS programme are generally expected to be realised by industry

The MHHS programme must deliver capabilities and outcomes that make those benefits possible

Extracts of LDP Weekly Status Reporting

M5 Completion Tracking – Acceptance Criteria (Status as of 18-Mar-22)

Owners	M5 Acceptance Criteria	Statuses
CPT	All material programme issues raised by the Elexon SRO/IM, Ofgem and IAP have been documented and have been resolved or are being effectively managed	Expected to be met
	GONG approach and criteria agreed	Expected to be met
	Any non-compliance (actual) is identified for all outcomes, and a respective action or mitigation plan is agreed with the Elexon SRO/IM	Items marked *
PMO	Initial detailed programme approach signed off by the Elexon SRO/IM	Expected to be met
PMO, PPC	Milestone readiness assessments are conducted, and a Milestone readiness report is produced and provided to the Elexon SRO/IM (in accordance with requirements agreed with Elexon SRO/IM) in advance of decisions on MHHS Programme progress	Expected to be met

M5 Completion Tracking – Deliverables (Status as of 18-Mar-22)

Owners	Description of Deliverable(s)	Format	Exit Criteria	Acceptances and Sign-offs	Statuses
SRO	Requirements Baseline – user, NFR, technical, comms network, service management	Document	Document accepted		On Track
	SI understands Design (knowledge sharing from Elexon to LDP)	Task	M5 milestone approval	Elexon (SRO/IM)	On Track
SRO & SI	Impacted code bodies resources available and plans agreed to draft changes following completion of design	Document	Document accepted		On Track
PPC	Delivered MHHS Participants Launch event within 1 month of M4 completing	Event	Deliverable approved	Elexon (SRO/IM)	21 April 2022
	Readiness Assessment Framework	Word or PowerPoint	Document accepted	Elexon (SRO/IM)	Met
	Readiness pro-forma: Survey & readiness criteria for industry population	Survey	Criteria achieved	Elexon (SRO/IM)	Met
	Readiness Assessment Report 1	Word or PowerPoint	Document accepted	Elexon (SRO/IM)	On Track

MHHS Programme – Summary

18 March 2022, Keith Clark

RAG Status	OVERALL	Approach	Plan	Resources (People, Tools)	Budget	Stakeholders	Risk	Governing Principles	Gov & Assurance

Overall Status

- Amber status is due to challenges on the programme schedule and to delays on portal development:
  - Major supplier challenge to the current programme schedule, which is based on the original Ofgem timetable. March PSGs addressed and agreed upon possible CR options and the plan is to move towards making recommendations to Ofgem at Apr PSG
  - Portal development significantly behind schedule. Recovery actions to improve the delivery dates will emerge as additional resources arrive into the development team next week
- **CPT**: LDP initial steps in understanding the impacts of CR001 & CR002 (on LDP) were taken with the aim of reviewing with the SRO team on 22-Mar-22. Meetings with the IPA continue, to reach consensus on the IPAF and to engage with them on their current assurance on the Design plan. Programme outcomes & related KPIs progressed and peer reviewed
- **PMO**: Initial detailed Programme approach and stages has been shared with SRO. This includes a proposed M5 to M9 interim milestone schedule. The plan for code drafting plan to M8 has been developed and proposed Change Request to move M6 and M7 has been issued to CCAG for comment. No feedback has been received from IPA on Change Control documentation – PMO have requested feedback ASAP so this can be incorporated and final sign-off requested by Ofgem
- **SI**: TAG first draft E2E Test Strategy distributed, working on first draft Test Data Strategy. Quality review of RFP technical and design documents was conducted - as requested by SRO procurement team. Glossary service and workflow implemented on the Portal, and steps have been taken to over-resource the Portal development team to help recovery
- **PPC**: The Open Day plans are well underway, and the invitation was issued via The Clock on 16-Mar-22. The Readiness Assessment 1 (RA1) responses are due on 18-Mar-22 we had received 29 responses by COB 17-Mar-22. A review of the existing website has been conducted and a proposal has been issued to the SRO team regarding what content should, and should not, be migrated over to the public facing portal.

LDP Function	Status
CPT	
PMO	
PPC	
SI	

Finance Update

- No current finance issues.

Next Steps

- Finish LDP impact assessments on CR001 and CR002 alongside SRO team
- Gather CR001 / CR002 impact assessments from Programme Participants – and start to prepare papers for April PSG
- Review 2nd draft of the IPA's IPAF with the IPA team
- Review proposed programme outcomes and related KPIs with SRO team
- Progress preparations for the MHHS Open Day
- Identify Portal recovery plan actions
- Continue engagement with the IPA as they mobilise.

Risks / Issues

- M5 date is at risk. Suppliers' proposal to delay the programme by 7-10 months would increase costs significantly and negatively impact Participants who are already mobilised
- The late mobilisation of the IPA team may impact on Ofgem's stated need for the IPA to form an opinion on the Suppliers' proposal for a programme delay
- Portal delivery slippages are impacting expected improvements in engagement with Programme Participants

MHHS Programme – PPC update

18 March 2022, Lauren Nicholls

RAG Status	OVERALL	Approach	Plan	Resources (People, Tools)	Budget	Stakeholders	Risk	Governing Principles	Gov & Assurance

Overall Status

- The 101 Guides were approved on 17-Mar-22. The documents will be shared in The Clock on 23-Mar-22 and socialised more broadly amongst the different constituencies.
- The Open Day plans are well underway and the invitation was issued via The Clock on 16-Mar-22. A further invitation will be issued to Programme Participants directly on 18-Mar-22. We have guest speakers from Ofgem and Citizens Advice.
- The Internal PPC Dashboard is in the process of being updated to include insights from each of the engagement sessions that we are convening. The weekly statistics are as follows:
  - Five follow up engagements were convened this week with TMA, Callisto, SSE (Supplier Agent business), Leep Utilities and Octopus.
- The Readiness Assessment 1 (RA1) responses are due on 18-Mar-22 and a further chaser has been issued to stimulate responses. We had received 29 responses by COB 17-Mar-22.
- The Case for Change per constituency is in the process of being developed and will be first tabled at the Open Day, work on the Advocate Network has also commenced.
- A review of the existing website has been conducted and a proposal has been issued to the SRO regarding what content should, and should not, be migrated over to the public facing portal.

Deliverables	Baseline	Forecast	Status
Dummies guide to MHHS and impact to system, process and data changes by constituency	28-Jan-22	17-Mar-22	Complete
Delivered Open Day within 1 month of M4 completing	28-Feb-22	21-Apr-22	Red
Readiness Assessment Framework	29-Apr-22	24-Feb-22	Complete
Readiness pro-forma: Survey & readiness criteria for industry population (RA1)	29-Apr-22	24-Feb-22	Complete
Readiness Assessment Report 1	29-Apr-22	08-Apr-22	Green
Readiness Assessment Report 2	29-Apr-22	TBD	Red

Finance Update

- PPC is currently at 6 FTE as planned.
- We have one outstanding vacancy within the team, which will be kept under consideration.

Next Steps

- Continue plans for the Open Day, generating the required content and planning the logistics for the day
- Finalise the case for change per constituency group and socialise these amongst the SRO as well as starting to update the change impact assessments and review the RA1 submissions
- Convene follow up engagement sessions with Programme Participants, focused on their continued mobilisation and support for the Design baseline
- Support SI with the CRM implementation due on 31-Mar-22, website content migration to the Portal due on 11-Apr-22, and also the enduring Readiness Assessment Portal development that is due on 27-Mayr-22.

Risks / Issues

#	Risk or Issue	Mitigation or Resolution	Owner	RAG status
R106	There is a risk that the primary contact used for the Readiness Assessments may not be available when the RA is issued, and access has only been granted to one person	All primary contacts within a PP should be granted access to the MHHS Portal so that more than one person has the ability to populate a Readiness Assessment on behalf of their business.	Nathan Nicholson	Amber
I016	Without the enduring CRM solution, PPC operations will be challenging, and wider Programme Team engagement with industry will be difficult to track	A CRM solution is expected to go live on 31-Mar-22 and the PPC team is working with the service provider to ensure the most up-to-date information is transferred	Sonia De Laurenzy	Amber

Extracts of Fortnightly Financial Reporting

Actual Position (1 of 2)

Figure 1a. Forecast position and actual position on monthly basis (6-month view)

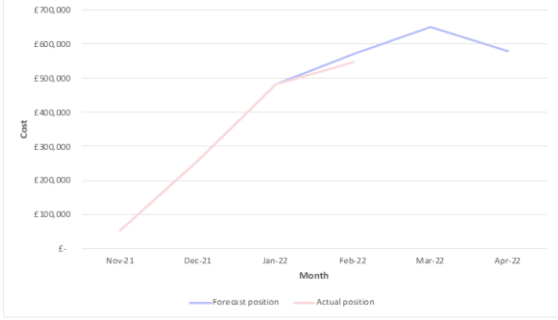


Figure 1b. Variance between forecast position and actual position to date

100% Position		Nov-21	Dec-21	Jan-22	Feb-22	Total
Forecast position	Resourcing	£ 55,000	£ 257,025	£ 483,250	£ 571,260	£ 1,366,535
Actual position	Resourcing	£ 55,000	£ 257,025	£ 483,250	£ 547,450	£ 1,342,725
Variance		£ -	£ -	£ -	£ (23,810)	£ (23,810)

90% Position		Nov-21	Dec-21	Jan-22	Feb-22	Total
Forecast position	Resourcing	£ 49,500	£ 231,323	£ 434,925	£ 514,134	£ 1,229,882
Actual position	Resourcing	£ 49,500	£ 231,323	£ 434,925	£ 492,705	£ 1,208,453
Variance		£ -	£ -	£ -	£ (21,429)	£ (21,429)

Commentary

- Overall underspend against forecast position in February 2022 of £23,810. 95.8% of the forecast budget consumed in February 2022
- Overall underspend against baseline position (BAFO) in February 2022 of £23,190. 95.9% of the baseline budget (BAFO) consumed in February 2022
- Overall position at the end of February 2022 is an underspend against baseline position (BAFO) of £221,670. 85.8% of the baseline budget (BAFO) had been consumed at this point

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Actual Position (2 of 2)

Milestone view

Figure 2. Actual position for milestones 4, 5 and 5+(3)

100% Position		Nov-21	Dec-21	Jan-22	Feb-22	Total
Milestone 4	Resourcing	£ 55,000	£ 257,025	£ 96,100	£ -	£ 408,125
Milestone 5	Resourcing	£ -	£ -	£348,400	£459,700	£ 808,100
Milestone 5+(3)	Resourcing	£ -	£ -	£ 38,750	£ 87,750	£ 126,500
Total						£1,342,725

90% Position		Nov-21	Dec-21	Jan-22	Feb-22	Total
Milestone 4	Resourcing	£ 49,500	£ 231,323	£ 86,490	£ -	£ 367,313
Milestone 5	Resourcing	£ -	£ -	£313,560	£413,730	£ 727,290
Milestone 5+(3)	Resourcing	£ -	£ -	£ 34,875	£ 78,975	£ 113,850
Total						£1,208,453

Commentary

- Invoice for February 2022 of £413,730 for milestone 5 issued on 7th March 2022 and is awaiting approval
- £78,975 of spend in February 2022 to be invoiced subject to approval of interim milestone planning currently underway
- LDP needs to complete the delivery of all milestone 4 deliverables to allow for the Milestone Achievement Certificate to be issued by the SRO. Once received, 10% invoice amounting to £40.8k for milestone 4 sign off will be issued for approval

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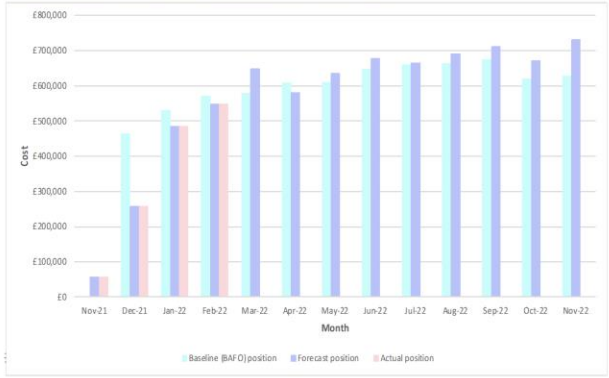
Forecast Position

Figure 3a. Baseline, forecast and actual position on monthly basis

100% Position		Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sub-total	Sep-22	Oct-22	Nov-22	Total
Baseline (BAFO) position	Resourcing	£ -	£ 464,065	£529,690	£570,640	£577,640	£607,390	£610,015	£645,890	£659,015	£663,390	£5,327,735	£673,890	£619,640	£ 628,390	£7,249,655
Forecast position	Resourcing	£ 55,000	£ 257,025	£483,250	£547,450	£648,525	£580,625	£634,975	£676,775	£664,075	£691,175	£5,238,875	£710,175	£671,675	£ 730,825	£7,351,550
Variance		£ 55,000	£(207,040)	£(46,440)	£(23,190)	£ 70,885	£(26,765)	£ 24,960	£ 30,885	£ 5,060	£ 27,785	£ (88,860)	£ 36,285	£ 52,035	£ 102,435	£ 101,895

Figure 3b. Baseline, forecast and actual position on monthly basis



Commentary

- Reforecasting exercise through to the end of November 2022 has been performed
- Annual leave, training commitments and resourcing requirements have been considered
- Forecast to be £88.8k underspent by the end of August 2022:
  - CPT workstream £132.6k underspent
  - PMO workstream £41.9k overspent
  - PPC workstream £9.1k overspent
  - SI workstream £7.3k underspent
- Forecast becomes increasingly inaccurate after August 2022, the 6-month mark
- Joy Mereki's (Scrum Master) time has been forecast through until the end of June 2022. If extension needed, will need to consider the impact of this on costs

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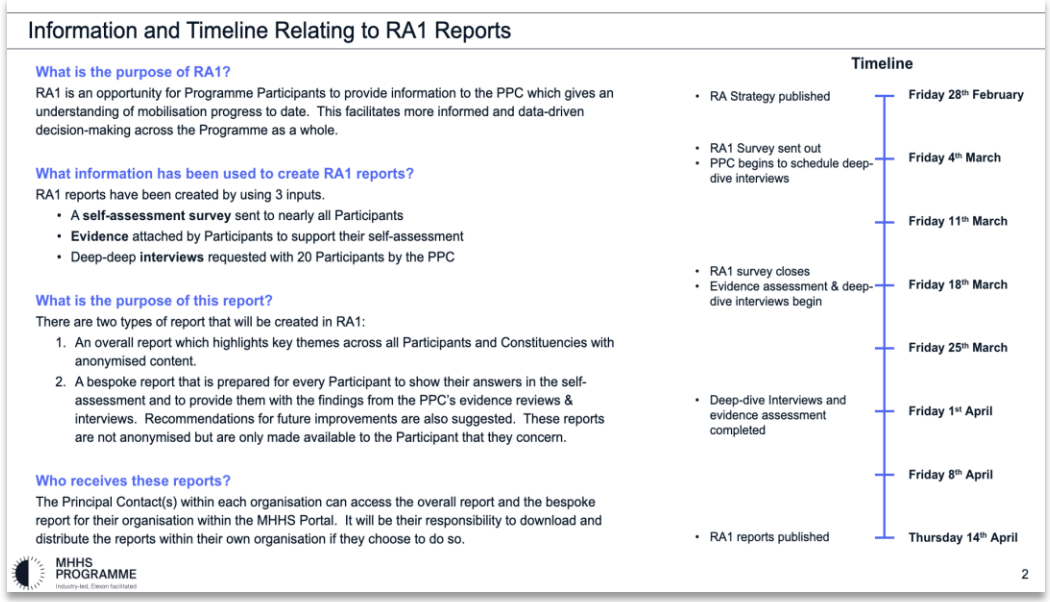
Extracts of Readiness Assessment Reporting



Information and Timeline Relating to RA1 Reports

What is the purpose of RA1?

RA1 is an opportunity for Programme Participants to provide information to the PPC which gives an understanding of mobilisation progress to date. This facilitates more informed and data-driven decision-making across the Programme as a whole.

What information has been used to create RA1 reports?

RA1 reports have been created by using 3 inputs.

- A **self-assessment survey** sent to nearly all Participants
- **Evidence** attached by Participants to support their self-assessment
- Deep-deep **interviews** requested with 20 Participants by the PPC

What is the purpose of this report?

There are two types of report that will be created in RA1:

1. An overall report which highlights key themes across all Participants and Constituencies with anonymised content.
2. A bespoke report that is prepared for every Participant to show their answers in the self-assessment and to provide them with the findings from the PPC's evidence reviews & interviews. Recommendations for future improvements are also suggested. These reports are not anonymised but are only made available to the Participant that they concern.

Who receives these reports?

The Principal Contact(s) within each organisation can access the overall report and the bespoke report for their organisation within the MHHS Portal. It will be their responsibility to download and distribute the reports within their own organisation if they choose to do so.

Timeline

• RA Strategy published	**Friday 28th February**
• RA1 Survey sent out • PPC begins to schedule deep-dive interviews	**Friday 4th March**
	Friday 11th March
• RA1 survey closes • Evidence assessment & deep-dive interviews begin	**Friday 18th March**
	Friday 25th March
• Deep-dive Interviews and evidence assessment completed	**Friday 1st April**
	Friday 8th April
• RA1 reports published	**Thursday 14th April**

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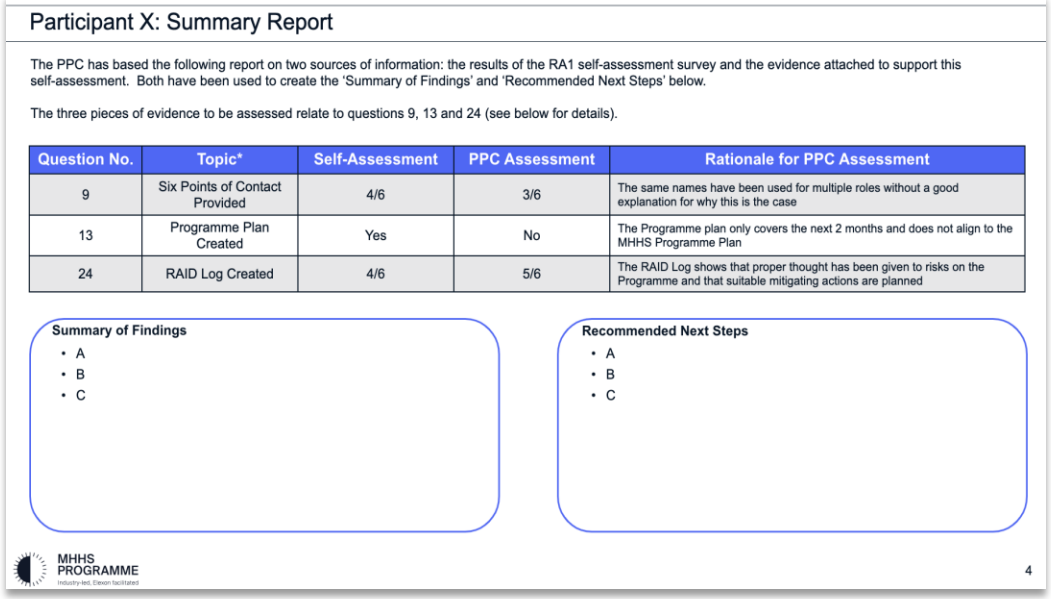

Participant X: Summary Report

The PPC has based the following report on two sources of information: the results of the RA1 self-assessment survey and the evidence attached to support this self-assessment. Both have been used to create the 'Summary of Findings' and 'Recommended Next Steps' below.

The three pieces of evidence to be assessed relate to questions 9, 13 and 24 (see below for details).

Question No.	Topic*	Self-Assessment	PPC Assessment	Rationale for PPC Assessment
9	Six Points of Contact Provided	4/6	3/6	The same names have been used for multiple roles without a good explanation for why this is the case
13	Programme Plan Created	Yes	No	The Programme plan only covers the next 2 months and does not align to the MHHS Programme Plan
24	RAID Log Created	4/6	5/6	The RAID Log shows that proper thought has been given to risks on the Programme and that suitable mitigating actions are planned

Summary of Findings

- A
- B
- C

Recommended Next Steps

- A
- B
- C

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Extracts of PPC Insights Reporting

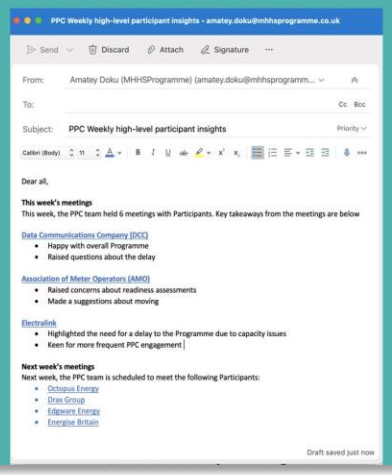
Proposed options

A weekly email to SRO and CPT teams will provide high-level Participant specific insights

Key features of this weekly report will include:

- **2-3 bullet points on the key takeaways from the week's meetings** to give recipients a quick overview on the top themes from the meeting. For readability, if a large number of meetings have taken place, the PPC team will draw insights from 5-6 key meetings and list the remaining meetings.
- **All references to Participants linking directly to the CRM** to allow the give participants the chance to read more details as required
- **Details of the meetings scheduled for the following week** to give the recipients an overview of which Participants will be soon be engaged by the PPC team.

Example email for illustrative purposes only



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Proposed options

A monthly engagement report will show engagement by constituency

Report features

- A visual, mapping out level of engagement at constituency level, and changes since previous reports
- High-level narrative and insights by constituency justifying mapping/scoring position
- Key actions that are being taken to improve constituency level scores/position
- Links to CRM where specific Participants are mentioned
- Key statistics or engagement metrics, including number of meetings held*

An annotated example report is included on the following slides

***The monthly engagement report will not duplicate the weekly report to CPT.** While the proposed monthly report will show statistics and engagement metrics, including number of meetings held, it is proposed that these are focused in this report on a select number of the most important data points to prevent duplication and to allow space for the engagement scoring and key insights.

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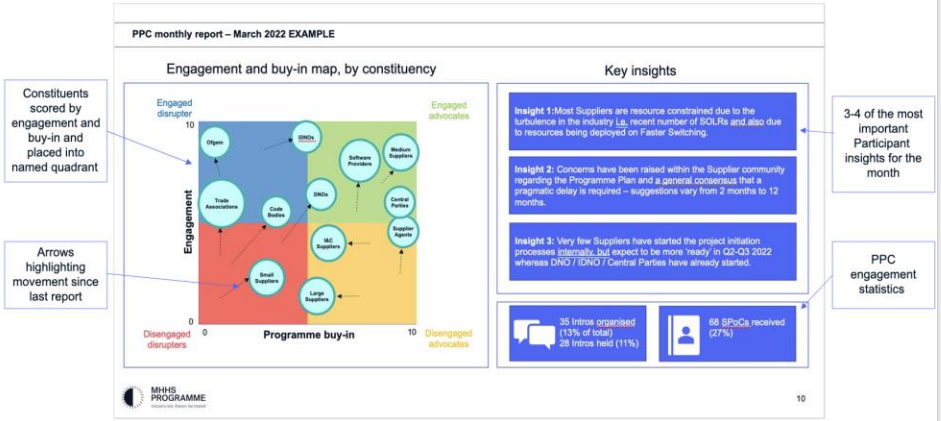
Proposed options

Constituents scored by engagement and buy-in and placed into named quadrant

Arrows highlighting movement since last report



3-4 of the most important Participant insights for the month

PPC engagement statistics

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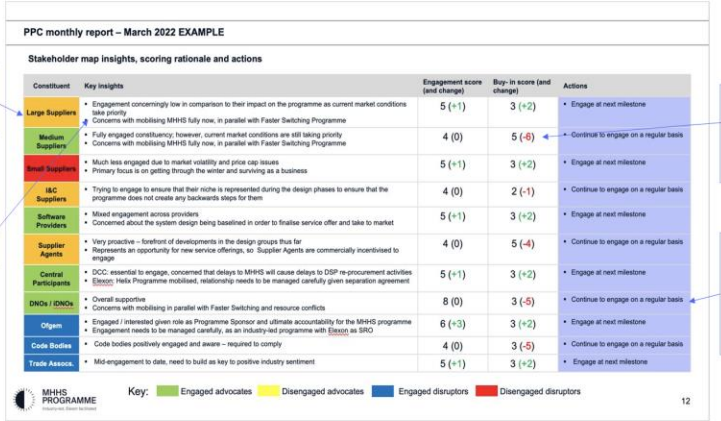
Proposed options

Constituents colour coded by scoring on previous page

2-3 key insights per constituency



Engagement and buy-in score and score change since last report

Actions to be taken to maintain or improve engagement scores

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Thank you

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