




**Delivering the
Leeds City Region
£200m p.a. Portfolio**

**Digital Transformation for
Governance & Collaboration**

Craig Taylor Gero Renker



PMO Conference 2019

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Gold Project and Portfolio Management
Silver Collaboration and Content
Silver Small and Midmarket Cloud Solutions



Project & Work Management with Microsoft Cloud

Strategy	Integration & Automation
Business Intelligence	Custom Solutions
User Adoption	Managed Services

Gero Renker
Director, Co-founder
Partner Advisory Council Member



Microsoft Partner
2017 Partner of the Year Winner
Cloud Productivity Award

Microsoft Partner of the Year
2016 Finalist
Project and Portfolio Management

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Introducing the Combined Authority

Craig Taylor

Head of PMO



West Yorkshire Combined Authority

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- Established in 2014
- Work closely with the private sector through the Leeds City Region Enterprise Partnership (LEP) and in partnership with local councils
- Operate the Metro network of bus stations, travel centres, public transport information and tendered bus services across West Yorkshire

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Our Vision

“For the Leeds City Region to be recognised globally as a place with a strong, successful economy where everyone can build great businesses, careers and lives supported by world-class transport, housing and digital connectivity.”



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About Leeds City Region



The facts

Northern capital

- £64.6 billion economy – the biggest contributor to the Northern Powerhouse

Innovation capital

- UK's largest regional finance centre
- More manufacturing jobs than anywhere in the country

Human capital

- 1.4 million workforce – largest and fastest growing in the North

Transport capital

- At the centre of the UK, within one hour's drive of 7 million people



Our Combined Authority family



Our brands:



Working in partnership with the West Yorkshire Combined Authority



The transport network of the West Yorkshire Combined Authority

Our core partner councils:



What we do

Four key priorities:

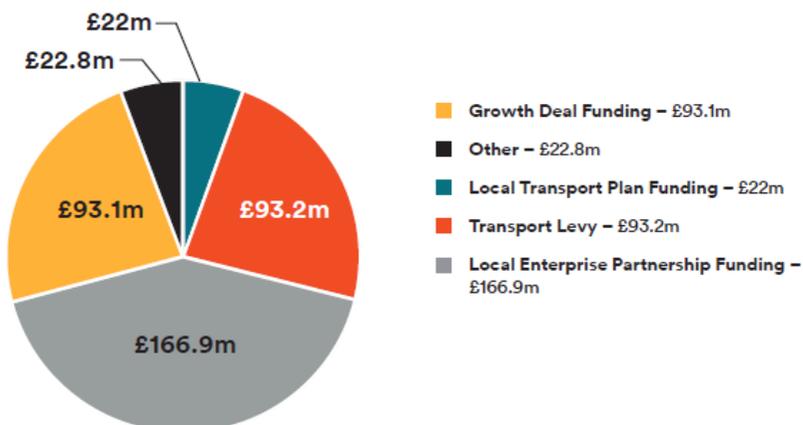
- **Boosting productivity** – helping businesses to grow and bringing new investment into the region to drive economic growth and create jobs
- **Enabling inclusive growth** – ensuring that economic growth leads to opportunities for all who live and work in our region
- **Delivering 21st Century transport** – efficient transport infrastructure that makes it easier to get to work, do business and connect with each other
- **Clean Growth** – initiatives making businesses more productive and households better off as well as contributing to reductions in emissions

Underpinned by a strong focus on delivery, ensuring the right projects are delivered on time and within budget.

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Funding

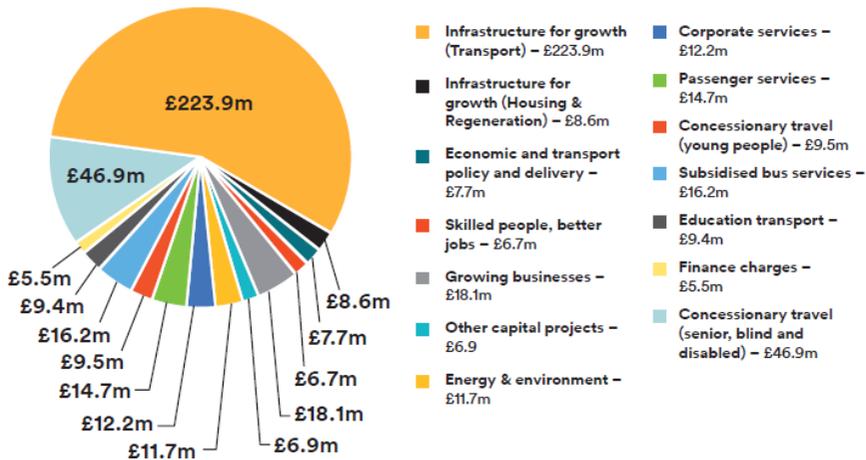
Where our funding comes from in 2019/20 Total income: £398 million



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Spend

How we will spend our money in 2019/20
Total budget: £398 million



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Delivery Directorate

Ensuring the delivery of a £200 million per annum portfolio of 250+ projects and programmes:

- **Growth Deal funding including Transport Fund** (target spend of £105 million in 19/20 and £516 million in total by March 2021)
- **Leeds Public Transport Investment Fund** (target spend of £72m original target in 19/20 and £173.5 million by March 2021)
- **Other programme funding** (Ultra Low Emission Vehicles, CityConnect, Local Transport Plan Integrated Transport Block and National Productivity Investment Fund, Broadband, Warm Homes, Growing Places Fund, Corporate Projects etc.)

Planning for future programmes (e.g. new Growing Places Fund, Transforming Cities Fund, Future Mobility programme, potential support to Shared Prosperity Fund)

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West Yorkshire
Combined
Authority

**PROGRAM
FRAMEWORK**

**Portfolio Management Office (PMO)
and the
Portfolio Information Management System (PIMS)**

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The PMO

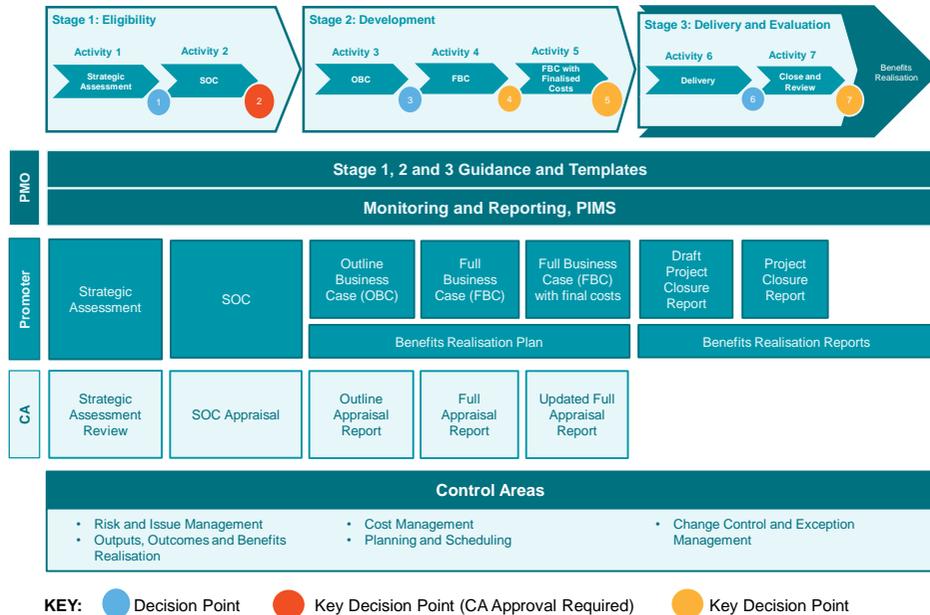


The PMO is a small team of 12 and is responsible for:

- Ensuring that all our programmes and projects adhere to the Assurance Framework
- That the necessary systems and processes are in place to consistently manage funding effectively and ensure the successful delivery of the outcomes
- Clear reporting to Government and the Combined Authority, enabling informed decision making

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The Assurance Framework



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The Problem

- Reliance on a varied array of systems
- Lots of data – located on the existing networks in lots of different places
- Out of date information about how all our projects and programmes are doing, including project outputs and benefits, risks, issues, costs and progress
- Lack of understanding of the Assurance Framework.
- Difficult to share information with partners therefore making full collaboration difficult
- Duplication of effort
- Difficult to get the portfolio overview we needed

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Our Approach

- Set up as a project
- Came through our assurance framework
- As part of the OBC all options were carefully considered and the strategic, economic, commercial, financial and management cases proved
- Benefits were clearly outlined and value for money shown
- Major transformational change so governance, stakeholder management and engagement was key

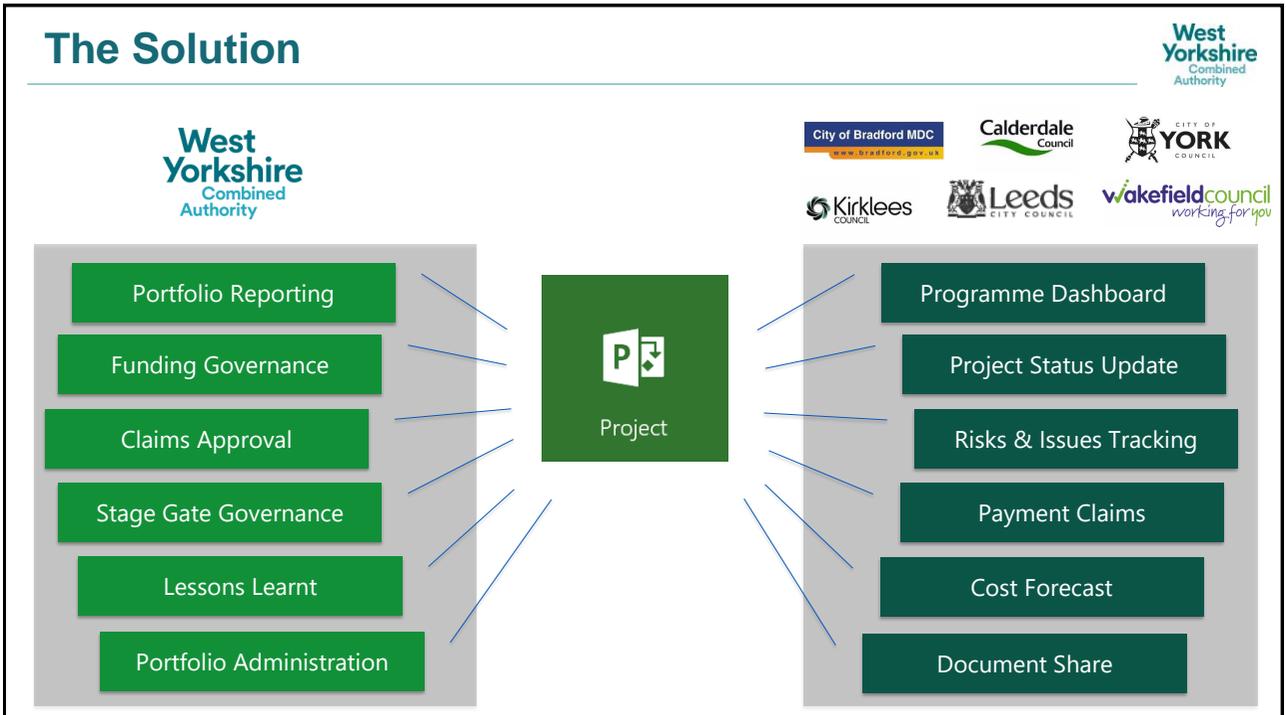
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The Solution

- Concluded that SharePoint, MS Project Online and Power BI was the most appropriate and beneficial platform as we are a Microsoft organisation and therefore integrates with our existing Microsoft Office 365 installation and it gave us the flexibility to configure around our Assurance Framework
- We wanted a company that understood the difference between portfolio management and regular project and programme management, as well as the importance of our Assurance Framework
- Our Microsoft partner gave us a list of a number of partners who specialise in SharePoint and MS Project Online implementations - so we put a specification together and went out to tender

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The Solution



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The Benefits

Collaborative platform

- All partners can access PIMS in a way that is relevant to them very straightforwardly (including on mobile devices). All you need is an internet connection as it is cloud based
- One version of the truth - accurate up to date information to make informed decisions
- All information we have about all of our programmes and projects is consistent and saved in one secure place

Customised functionality

- Configured around our assurance framework to include information on project outputs and benefits, risks, issues, costs and progress
- Allows partners to claim funding more readily than they used to.
- Huge time-saving in how the claims are processed

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The Benefits

Dashboards provide insights into the projects, programmes and funding streams that previously did not exist

Power BI allows dashboards and reports to be easily configured to meet ours and partners needs – and they look good!

Makes us more much easier to work with and we are adding value

The information is driving a much more focussed and strategic conversation across all parts of the region

We are saving time and costs by becoming more efficient, accurate, timely and transparent

The PMO still has the same number of staff as before but now we can concentrate more on influencing and delivering greater value to our partners

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The Benefits

Transparency and a full audit trail

Efficiency - reduced manual data input and manipulation.

Enables partners to use the information to produce their own project and programme reports

Provides a robust foundation for ongoing performance measurement, assurance and strategic reviews

Enables greater control over project documentation, including robust version and change control

Enables high visibility on progress and of issues and challenges that are developing

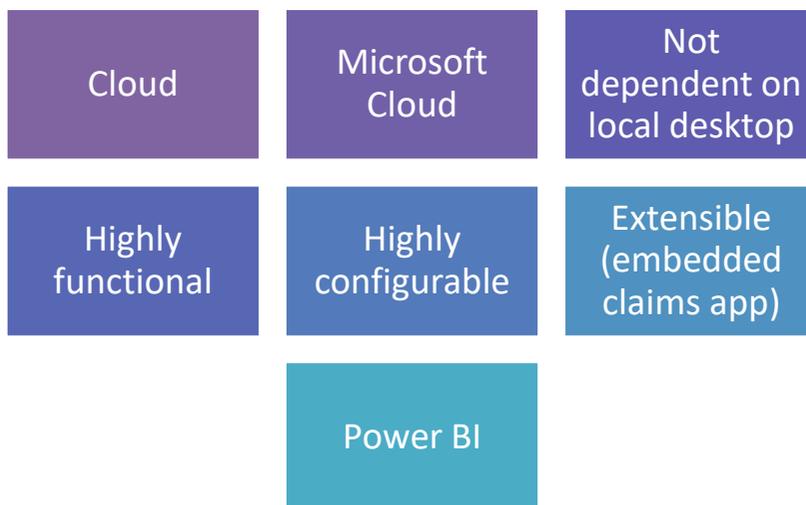
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Challenges and Lessons Learned

- IT project – we were clear on what outcomes we required but not always the detail – some iterations were required
- We are a PRINCE2 organisation. An agile project management methodologies may have been more appropriate
- Be less optimistic with regards timescales
- Work closely with your stakeholders early on to ensure all requirements are captured up front and are achievable – buy in
- Ensure time is built in to work with your developer on site during development – to build relationships and understand requirements
- Don't underestimate how long the initial data input will take

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Success Factors



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West Yorkshire Combined Authority



Any Questions?

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Case Study on Our Website

Challenge:

West Yorkshire Combined Authority (the CA) is currently investing around £2 billion, working in close partnership with local councils and business to deliver better transport and housing, regenerate regional towns and cities and protect the environment. Most of the CA's work benefits 10 local authority areas known collectively as Leeds City Region. The CA champions the region's interests to secure government and other investment to drive their economy forward.

The CA used to rely on a variety of systems. There was a degree of duplication of effort, and it was impossible to get the portfolio overview full view needed. The constraints around sharing information were making collaboration difficult. Consolidating the vast amount and complexity of data they have to deal with, there was a clear need to transform their way of working.

Our Microsoft PPM Solution:

Program Framework worked with the CA's PMO to implement one collaborative cloud environment, powered by Microsoft Project Online, SharePoint Online and Power BI. The system was designed 'Portfolio Information Management System' (PIMS).

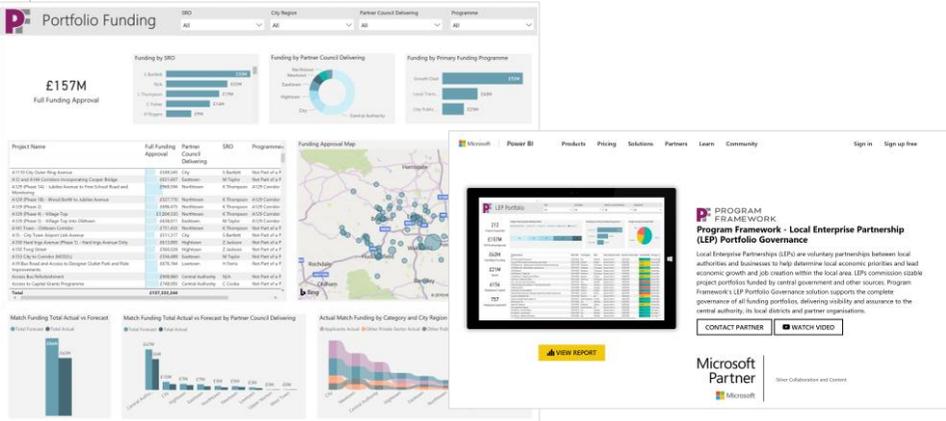
The solution was built using an iterative approach and supports all aspects of portfolio governance and reporting. It provides a shared platform for all partner organisations, allowing them to supersede collaborative across organisational boundaries. Document management is a significant aspect of this, with shared document libraries making it easy for all parties to locate and easily work on documents. Rich data is being captured, including risk, milestones, outputs, benefits as well as all financial aspects of the programmes.

A key component is a seamlessly embedded Funding Claims entry feature, allowing clients to transfer claim spend and new payment claims. Claims are validated by the tool and submitted to the CA for approval and payment. Along the way all parties have full transparency of funding needs for each project.

Power BI plays a huge role in driving customer engagement and adoption. Each client partner organisation has access to their own dashboards, providing insights into their projects, programmes and funding streams within the portfolio. The CA meanwhile has all the analytical power to support vision visibility and deliver reports to internal and external stakeholders internally and with minimum effort.

This solution has been published as a Power BI Solution Template here

programframework.com/case-studies



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Free Seminar - Join Us July 10 in the City



PMO Transformation with Microsoft Cloud

Now and in the Future

Register @
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 BREWIN DOLPHIN

Establishing a PMO with Microsoft PPM Cloud Foundation



Earl Taylor
Head of PMO
Brewin Dolphin

AI and the Future of PPM

- Opportunities and impact
- How to prepare for AI
- Live demo of Microsoft AI services