PRINCE2®

Chesterfield Borough Council

Migrating users to agile ways of working

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Case Study
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AXELOS GLOBAL BEST PRACTICE

Contents

1 Introduction

Chesterfield Borough Council (CBC) is a district council covering the second-largest urban area in the county of Derbyshire, Chesterfield has a population of 104,000 people.

As a local authority, CBC is responsible for delivering a wide range of services to the local community, including collecting rubbish, maintaining green spaces, regulating local health and environmental standards, processing planning applications, developing the local economy, and so on. CBC currently has three main objectives:

- making Chesterfield a thriving borough
- improving the quality of life for local people
- providing value for money services.

To deliver these objectives and services, the council employs more than 800 staff across several sites. Almost all of the staff need IT systems to do their jobs.

I am Hannah Barnett, and I work for CBC as an IT Project Lead. I first studied PRINCE2® in 2011 when I moved onto the project team, and I applied elements of it through a project support role and then as a project lead. My department has tailored the use of PRINCE2 to suit the environment and size of the team. It provides the backbone for the way we structure projects' lifecycles and documentation.

In April 2018, the Council's cabinet agreed to invest in the IT Improvement and Digital Transformation programme as part of its objective to provide value for money services. The nine-year programme started in 2018 and aims to:

- give staff the software and equipment they need to do their jobs more effectively
- increase the resilience and security of systems and networks
- streamline services
- use the latest technology to allow customers to do business online.

The programme is made up of many different parts, which are grouped into four themes:

- **People and resources** using our biggest resource, our staff, to provide services in the best possible way
- **Digital transformation** improving current processes and using digital technology to enhance services for customers
- **Getting connected** ensuring we have the right network, security, and connectivity in place
- **Software and systems** reviewing and developing the applications and tools we use.

There are many interrelated projects within this programme. Initially, I worked on the Windows 10 upgrade arm of the Windows 10/Office 365 migration project, which covered all the CBC hardware (excluding servers). This project was scheduled for the start of the programme because it provided the foundation on which we could build the rest of the new IT programmes, such as cloud programmes. Also, Microsoft announced they would be no longer support Windows 7 as of January 2020 so, with many users still on Windows 7, we were working under security and PSN compliance drivers.

CBC used PRINCE2 in a tailored way. The project brief had already been received from the programme. During the initiation process, the project was defined, the business case detailed, and a high-level action plan created. Because the project started at the end of 2018, the project was budgeted over three financial years with an end date of January 2020.

Table 1.1 shows the budget over the three years.

Table 1.1 Budget outline

Year	2018/19	2019/20	2020/21
Budgeted spend (£)	30,000	299,684	293,870

During each project stage there was stakeholder engagement and ongoing communication, as outlined in the communication plan. We sent highlight reports containing resources, costs, risks, issues, and actions to the programme board. At the end of each stage, lessons were gathered in a log. They were then considered in the next stage to improve the user experience and result in higher user acceptance of the outputs.

At the end of one stage, authorization for the next stage was put on hold due to a change in scope against the business case. The plan was updated and we were authorized to continue with an extended end date.

However, because Covid-19 put a greater emphasis on staff working from home, the project had to be fast-tracked; we needed to move the end date up by three months. The board decided to manage by exception; the new aim was to complete the project in a three-week period.

Once the last of the sites had been upgraded and user acceptance signed off, support was moved over to the IT service desk. Benefit realization happened later than normal due to the volume of staff moving to remote working. There had always been a cultural piece relating to this project (which was reflected in the communication workflow) to try and encourage staff to work from home. Initially, this had been met with reluctance. However, when staff had no choice but to work from home, IT realized the benefits as staff were embracing the different way of working.

1.1 INITIAL FINDINGS

In 2017, after a review of the main risk areas for CBC, we found that IT and its infrastructure were the biggest risks to business continuity, and improvement and investment were needed.

One large risk was that, from January 2020, Windows 7 and Windows 8 would no longer be supported by Microsoft. To mitigate this, we put a lot of focus on upgrading the Windows 7 PCs and Windows 8 laptops as part of the IT Improvement and Digital Transformation Programme.

Some of our early decisions included retiring PCs and introducing laptops with Windows 10 and Office 365. We hoped that this would enable hotdesking and more flexible work practices, as well as a more agile, resilient culture. We also decided to upgrade CBC's LAN infrastructure, opting for a cloud-managed solution.

2 Approach

2.1 THE PLANNING PROCESS

The IT Improvement and Digital Transformation Programme was conceptualized over nine years (2018 to 2027). In the first year, the scope for the Office 365/Windows 10 project and resources was agreed. The upgrade of the laptops was an early project within the programme. That project is the subject of this case study.

First, we categorized the areas to be upgraded by sites and teams, focusing initially on outlying sites. We had to prioritize because there was a risk of pressuring the service desk if we upgraded too much at once, especially because we had not tested the new LAN infrastructure rigorously.

We planned to upgrade the core: three big sites with up to 200 users each (the Town Hall, Customer Services Centre, and Operational Services Division) later in the project as individual stages.

Each site had its own project plan that was part of the high-level plan. In highlight meetings, we went over the high-level plan with the directors. During one of these meetings, the requirements for the project changed. The sites, due to be upgraded, were swapped around because of contractual changes between CBC and one of its partners, Arvato PSS. At this point we were approximately 33% through the upgrades and about to start work on the first of the bigger sites. Although the stakeholder engagement was already underway, a request for change was put through due to the rescheduling of the project plan, and the customer services centre was pushed back.

Issues and risks were added to the highlight report, the project plan was updated, and a stage that would have been carried out two months in advance was pulled forward. The drivers for the project were still the same, and the business justification was continually reviewed. Because there were no additional costs at that point to consider, the justification was unaffected.

Initially, the end date for the project was set as 17 January 2020, which was when Microsoft would stop supporting Windows 7. However, Microsoft announced they would be offering extended support and our project board agreed to buy this package to ease pressure. This meant the project would be extended to end in July 2020.

Table 2.1 shows a high-level view of our original project plan. This plan, however, changed due to the pandemic. Table 2.2 shows the original action plan.

Table 2.1 Pre-Covid-19 project plan

Key Deliverables	Planned Date
Office 365 foundations high-level design	08/02/19
Office 365 foundations infrastructure built and configured	25/02/19
Successful pilot and testing of in scope Office 365 toolset	21/06/19
Office 365 migration complete for 50% of CBC users	29/11/19
Office 365 migration complete for 100% of CBC users	29/06/20

Table 2.2 Pre-Covid-19 action plan

Team	Location	Indicative number of users	Planned date
Planning	Town hall	15	17/03/2020
Licensing	Customer service centre	10	02/04/2020
Call centre	Venture house	18	14/04/2020
Call centre	Customer service centre	2	16/04/2020
Customer services	Customer service centre	8	16/04/2020
Town hall reception	Town Hall	1	16/04/2020
Revs & Bens managers	Customer service centre	4	28/04/2020
NNDR	Customer service centre	8	28/04/2020
Credit income and scanning	Customer service centre	6	28/04/2020
Council tax billing	Customer service centre	14	12/05/2020
Council tax recovery	Customer service centre	8	12/05/2020
Benefits downstairs	Customer service centre	20	26/05/2020
Benefits upstairs	Customer service centre	12	02/06/2020
Rents/legal	Customer service centre	17	15/06/2020
Pavements	Pavements	4	24/06/2020
Cashiers	Customer service centre	7	29/06/2020

Table 2.3 shows the change in pace to get the final 154 devices out to staff.

Table 2.3 Covid-19 commencement action plan

Team	Location	Indicative number of users	Revised date
Planning	Town hall	15	17/03/2020
Licencing	Customer service centre	10	19/03/2020
Call centre	Venture house	18	17/03/2020
Call centre	Customer service centre	2	17/03/2020
Customer services	Customer service centre	8	21/03/2020
Town hall reception	Town hall	1	16/04/2020
Revs & Bens managers	Customer service centre	4	16/03/2020
NNDR	Customer service centre	8	21/03/2020
Credit income and scanning	Customer service centre	6	21/03/2020
Council tax billing	Customer service centre	14	20/03/2020
Council tax recovery	Customer service centre	8	21/03/2020
Benefits downstairs	Customer service centre	20	21/03/2020
Benefits upstairs	Customer service centre	12	21/03/2020
Rents/legal	Customer service centre	17	21/03/2020
Pavements	Pavements	4	24/03/2020
Cashiers	Customer service centre	7	21/03/2020

When it became apparent that Covid-19 was threatening office environments, the project board decided that the customer services centre must be upgraded to Office 365 and Windows 10 within two weeks.

The customer services centre is very important because it provides services and support to local people. We needed to ensure the department of 140 people was able to run safely and remotely.

2.2 SPECIFICATION OF REQUIREMENTS

Because we were looking to upgrade several elements as part of this project (and others running alongside in the programme) with the Windows 10 and Office 365 elements, we decided to start with a blank canvas in terms of software to prevent 'software rust'.

We tested a new build for laptops which included a new VPN, asset management software, Office 365, Windows 10 and other programmes which were used for individual departments.

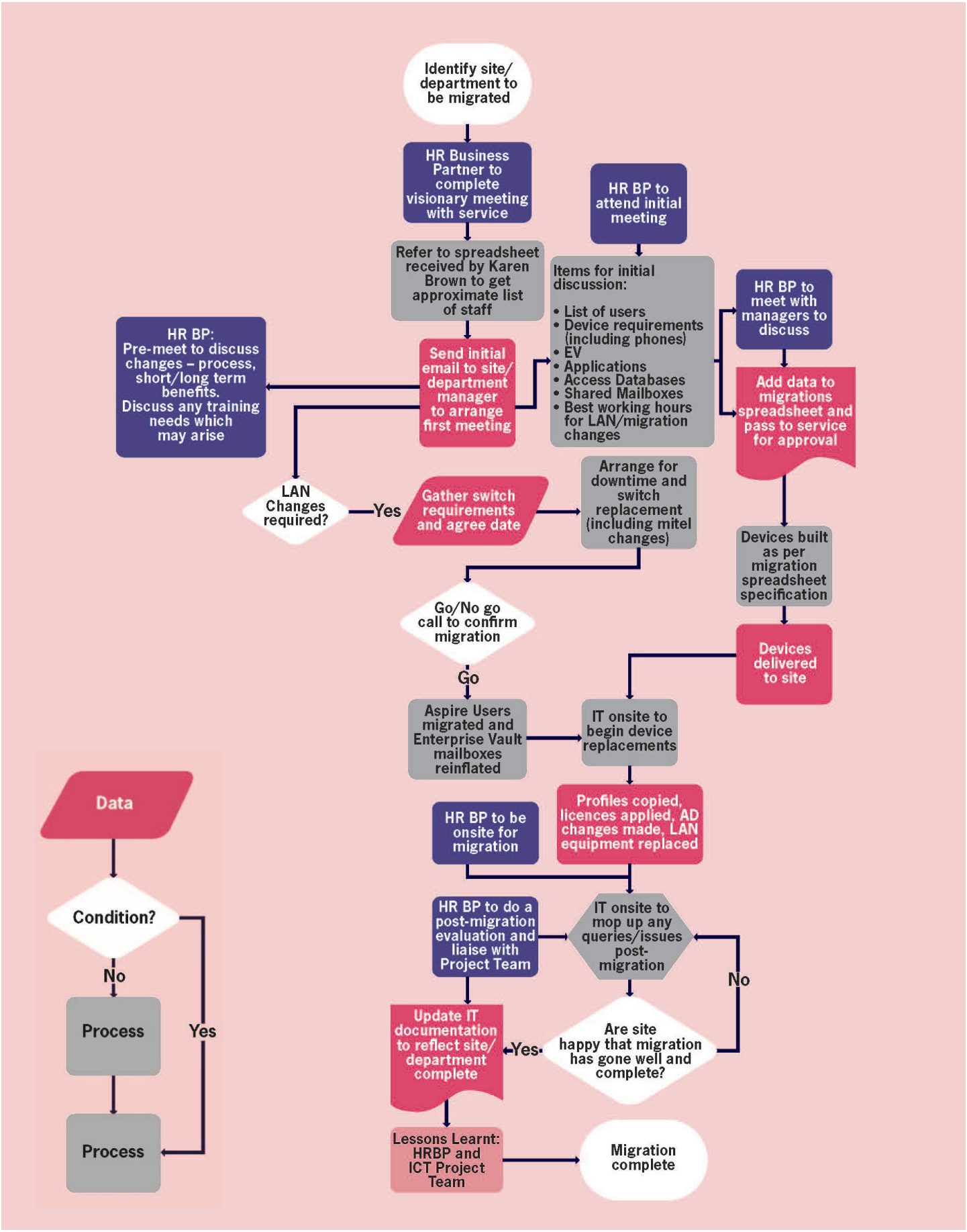
Following a thorough four-week testing period by IT staff, we piloted the changes and new laptops at one of our satellite sites.

Prior to go-live day, a new build laptop was provided for the service to test and approve. We held a 'Go/No-go' meeting on the day before the planned upgrade to ensure all parties were comfortable with the change. On go-live day the equipment was upgraded, accounts moved from on-premises to Office 365, and the site's LAN equipment upgraded to cloud-managed switches.

The day after the go-live day, an early life support team was on site to document any issues in a lessons log. This learning was used to inform the next stage as part of continual improvement.

Figure 2.1 shows the process used for each stage of the plan.

Figure 2.1 Project plan



3 Challenges

Before Covid-19, one of the largest challenges we faced was encouraging people to change the way they worked. Before the project started we encouraged staff to work remotely for at least one day a week to allow for hotdesking, but there was some resistance to moving away from traditional ways of working.

However, during the national lockdown our staff became more receptive to the new approach. Now, thanks to the support of appropriate technology, many of our staff members would happily work remotely full-time.

We also encountered a resourcing issue midway through the project; one of our staff members left the organization, placing pressure on the service desk team (who were already managing issues from the upgrades). This was raised as a risk with the project board, which contributed to the decision to invest in the extended support package from Windows 7.

The last upgrades were completed just as staff were advised to work from home wherever possible, in line with Government guidance. This meant we had to quickly train people on how to work remotely. We created information guides and made them available on our intranet and asked managers to share them with their teams. We knew that effective communication was key if staff were to work effectively and continue to provide high-quality services.

Ensuring communication was effective and having an early life support team in place were two of the key lessons added to the lessons log for future projects.

4 Successes

Any member of staff can now work from home if the nature of their role allows it. They have access to all the vital systems they need because of our technology upgrades. This has allowed us to deliver essential public services to our local community throughout the pandemic, while keeping our workforce safe.

In addition, pressure has been removed from the server capacity because staff are saving files in OneDrive, LAN equipment can be managed remotely, and there is very little need (from an IT perspective) for staff to be on-site. Lockdown allowed the benefits of our project to be quickly realized.

The use of a risk management approach to identify risk, evaluate options available to us, plan and schedule tasks, and support communication and implementation contributed to the success of this project.

5 Conclusion

Despite the latter stages being impacted by lockdown restrictions, the project has achieved the following:

- All council devices were upgraded to Windows 10 and Office 365.
- More cloud-based programmes have been installed to allow for more flexibility and agile working.
- LAN equipment has been upgraded to allow for cloud-managed maintenance.

We did have to build in some resiliencies to our new systems. For example, IT operatives do not need to be physically pushing a button to start an installation. Mobile phones are now managed by Intune and software updates are deployed through SCCM.

An early life support team was effective in relieving pressure, but also being a go-to for staff to provide a better experience.

Using the lessons learned from the Windows 10 and Office 365 project, the IT team has successfully deployed a piece of software that allows users to make and take phone calls through their corporate device or corporate phone (a softphone solution).

Effective communications were crucial to our success. In particular, as part of the Change Approval Board (CAB) process we used the 4:2:1 communications principle:

- Four weeks away: inform managers of the change and allow the message to be cascaded down
- Two weeks away: inform all staff who will be affected
- One week away: issue reminders.

There were many benefits of using the PRINCE2 method to manage this project. PRINCE2 aided cross-team communication and understanding; it provided the structure that clearly outlined what we wanted to achieve, timelines, and what the resources would need to be. The communication plan and highlight reports kept the stakeholders and the project and programme boards informed of progress, issues, risks, and engagement.

When Covid-19 hit the UK, our working environment changed rapidly. If we hadn't had the structure of PRINCE2, we would not have had the controls we needed to identify what the change was, assess the impacts, and move forward. Because we had the PRINCE2 structure, we were able to manage by exception and get approval to pack the final 154 devices into a three-week window.

We achieved our desired outcomes. All devices were upgraded, and the majority of our workforce is now able to work flexibly. Because of Covid-19, the outcomes and benefits were realized far sooner as staff had to rapidly embrace a new way of working.

6 About the author

Hannah Barnett started her career in IT in 2011, initially joining the Service Desk for Arvato PSS, working with the Chesterfield Borough Council Partnership. In October 2011 she moved teams to work in the projects team and took PRINCE2 Foundation to provide a solid basis for managing projects. She delivered projects within Chesterfield Borough Council and Arvato PSS, and for a short time delivered services to Deutsche Bank.

When the IT Service was brought in-house with Chesterfield Borough Council, she took the IT Project Lead role in the IT Improvement Programme, working in both a lead and support capacity on improvement and operational projects. In 2020 she took MSP® Beta at Foundation level, which led to her new role integrating some of the Business Change Manager responsibilities.

Further reading

AXELOS (2017). *Managing Successful Projects with PRINCE2®*, 6th edition. TSO. London.

AXELOS (2020). *Managing Successful Programmes*, 5th edition. TSO. London.

AXELOS (2020). *PRINCE2® in 1,000 words*. White paper. Web. Available at: www.axelos.com/case-studies-and-white-papers/prince2-in-one-thousand-words-white-paper [Accessed 13/01/2021]

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