Appendix 2 - DB&I Programme History - Summary					
Note: Sourced from Programme Board reports; does not purport to be a comprehensive history of the programme but is to be used to provide an overview of the programme through its lifetime, as seen by the papers presented to and discussed by the Board..					
Year	Month	Programme Board Meeting Dates	Programme own RAG Rating	Phil Hall Notes on Programme Board papers	Ref Cabinet / Scrutiny reports
2019	August	2nd		First meeting of the Board. Approved a Project Initiation Document (PID) and framework for Strategic Options Appraisal. Board established and Programme Manager (later Director) appointed.	
2019	September	12th		Reviews draft Outline Business Case (OBC)	
2019	October				OBC approved by Cabinet (29th)
2019	November	1st		Moore Stephens Insight (external adviser) presented Strategic Options Appraisal which recommended procurement strategy (to conduct single restricted OJEU tender process, to let one contract to one supplier for both implementation and Software as a Service (SaaS). Initial procurement activities mobilised. Initial programme plan proposes go-live date of December 2021.	
2019	December	2nd		Progress being made	
2020	January				
2020	February	5th	G	OJEU notice published	
2020	March	3rd	G	14 suppliers had responded to the OJEU notice, offering a wide range of system platforms	
2020	April	3rd	G	Shortlist of 6 bidders to be invited to tender (comprising 3 systems - SAP, Oracle and Unit4). Implementation stage governance agreed UK enters COVID lockdown.	
2020	May	5th	G	Tender process underway. Programme organisation (workstreams, etc) agreed.	
2020	June	3rd, 18th	G	Considered programme vision statement following internal engagement Unit4 identified as preferred bidder through evaluation process (60% Quality; 35% Financial; 5% Social Value).	

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2020	July	1st	G	Focus on business change ("as-is" process workshops) and data cleansing	Cabinet approved Full Business Case (FBC) and award of contract to Unit4 (21st)
2020	August	N/A			Contract signed (28th)
2020	September	2nd	G	Unit4 and Embridge Consulting joined the Board. Focus on mobilisation. Reviewed draft programme plan.	
2020	October	2nd	G	Approved updated PID - two phases for impleemntation; Phase 1 Proactis (Procurement) in June 2021; and Phase 2 the integrated ERP solution in December 2021.	Update to RPSC (8th)
2020	November	4th	G	Progress reports reviewed. Review of Risk Log. Approved benefits realisation next steps Update on data archiving project	
2020	December	2nd	G	Progress reports reviewed. Approved data archiving project initiation document Approved communications & engagement plan for readiness stage	
2021	January	8th	G	All design activities reported to be complete. Approved closure of Design Phase and progression to Build Phase Considered Organisational Impact Assessment	
2021	February	4th	G	Some workstreams moving to Amber rating.	
2021	March	3rd	G	Caveated sign-off to Phase 1 (Proactis implementation)	Update to RPSC (18th)
2021	April	6th	G	Build & Integration System Testing (IST) Phase 1 Gateway approved Considered benenfits prioritisation Approved approach to Training Agreed "MySurrey" name	
2021	May	5th	G/A	Phase 1 testing issues leading to delay by one month	

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2021	June	2nd	G	Phase 2 Testing process agreed	
2021	July	2nd	A	Core Build meetings complete but some concern about volume of change requests and additional reports being specified	
2021	August	3rd	A	Phase 1 has gone-live Phase 2 core build complete but IST slower progress Reporting workstream delayed	
2021	September	3rd, 24th	A	Milestones assessed as Amber Reporting and HR/Payroll workstreams assessed as Red (design delays impacting on readiness for user acceptance testing) **Special Meeting on 24th concludes that Dec Phase 2 go-live is not achievable; considers options for revised go-live and selects April 2022**.	
2021	October	1st, 22nd	A	Board reflected on lessons learnt to date and agreed revised ways of working for itself (eg more engagement with subject matter experts) going forward	
2021	November	12th	R	Rectification plan in place but significant delivery risk reported, especially in data migration and HR/Payroll Test cycles 3 & 4 overlapping	
2021	December	8th	R	Significant delivery risk. Test cycle 4 underway but started late	Cabinet approve replanning and additional budget (21st)
2022	January	7th	R	Significant delivery risk. Test cycle 4 positive momentum but high volume of tests being deferred to 5th cycle Priority HR build complete Focus on schools' risks	Update to RPSC (20th)
2022	February	4th	R	Similar messages as January. 2nd Payroll parallel run missed closure deadline. Test cycle 5 underway. Sponsors Group would assess go-live readiness in mid-February	

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2022	March	17th	R	**April Go-live postponed; programme to be replanned**	
2022	April	N/A			
2022	May	6th	R	Programme risk rating reflects previous April go-live target; revised date has been agreed as Phase 1 (corporate) in Sept 2022 and Phase 2 (schools) in Dec 2022. Acceptance criteria for payroll parallel runs considered (decision at next meeting). Closed test cycle 5 for progression to cycle 6.	
2022	June	10th	A	Approved closure of hypercare for Proactis (Phase 1)	
2022	July	8th	A	Payroll parallel run progress positive but delayed. Test cycle 6 identifying significant number of defects for resolution and retesting.	
2022	August	18th	A	Range of testing and reconciliation issues and delays being addressed	
2022	September	7th, 28th	R	**Unable to progress to an October go-live** Test cycle 6 closed but with lesson learnt that previous test cycles should not have been closed until all defects satisfactorily resolved	
2022	October	5th, 31st	R	High-level revised plan drafted, with detailed replanning to follow Focus on integration testing, reports testing and payroll parallel run for bureaus Change of Programme Director wef 3rd October. 31st - focus on the "red box" - the activities critical to freeze the build and move towards data migration and cutover; these to be completed by 9th Dec Three options had been considered for revised go-live - June 2023 selected	
2022	November	N/A			
2022	December	6th		Progress reports reviewed Decision to close the "red box" and progress to next stages of programme	Cabinet approve additional budget (20th)
2023	January	23rd	G	Data migration reconciliation underway but proving time-consuming. Testing delayed to 1st Feb Detailed dress rehearsal and cotover planning underway.	
2023	February	28th	A	Week 4 of testing - 689 tests so far executed.	

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2023	March	29th	A	Test cycle 7 completed, 1278 tests executed, 210 failures to be retested. Dress rehearsal initiated. Detailed ("1500 lines") Cutover Plan in place.	
2023	April	28th		Meeting to approve plan to exit testing	
2023	May	31st		Meeting to agree go or no-go. All critical issues assessed as being in stages of resolution. 16 specific criteria for go-live assessed and 5 Amber but with mitigation plans in place. Reviewed post go-live support model. Approved go-live for 6th June	
2023	June	16th, 28th		**Go-live took place on 6th June.** Meetings to review go-live progres and issues being identified. High volumes of issues - Support Team feeling "overwhelmed" but this felt to be expected. Variety of schools-related issues identified; dedicated team in place to resolve. June payroll run but with subsequent issues.	
2023	July	7th		Call volumes remaining high; considerable programme activity to address issues.	
2023	August	23rd		Call volumes declining but issue identification remains high. Hypercare RAG: Managed Service & Support, and Payroll both assessed as Red. Options for Transition to BAU considered	
2023	September				
2023	October				Update to RPSC including proposal for Task & Finish Review (18th)
2023	November				
2023	December			Closure of Programme and handover of issues to Transition to BAU project	

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