

Blood Technology Modernisation  
**NHSBT Board Report**



# Programme Summary - July

Reporting date: 09/07/2021  
SRO: Wendy Clark  
Accountable Exec: Christie Ash



Blood and Transplant

Note from Programme Director

## The programme objectives are to Stabilise and Secure Blood Technology.

RAG Status	
Previous	A
Current	A
Trend	→

- Programme is progressing well but continues to report Amber due to unproven C# development estimates. This will continue until Sep/Oct as estimate assumptions are tested and validated. Forecasts have been estimated for remaining programme incremental scope complete from Sep onwards to meet targets.
- Discovery work has started to provide the Business with access to Pulse data through the Integration Modernisation and Data Ecosystem workstreams.
- Change request of £315K (from contingency) to manage delays in testing due to unplanned resource constrains in testing team approved within the tolerances of the Portfolio Board. Contract awarded to test partner, Edge who have started to provide incremental capacity. See appendix for detail.
- September's final release of Legacy changes has been delayed by 1-week, due to delays to testing resourcing issues. No knock-on impact to future release schedule.
- A diverse mix of new joiners and internal progressions have been appointed to the team. Recruitment campaign continues to plan.
- We continue to work closely with the Plasma Programme Team to understand and Impact Assess any new demand. Expecting a decision on scope by the end of July.
- Finance approved budget includes the £315K approved CR for temporary test augmentation. Over forecast of £80K (within contingency) expected to be mitigated through cost actions
- The overall programme risk position has improved; the risk of new unplanned work arising has reduced as a consequence of greater certainty of Plasma for Medicine (PFM) demand; the risk of not securing new resource has also diminished as a result of a successful recruitment campaign.

Key Performance Indicators

Progress against plan			Budget/spend			Scope			Quality			Benefits			Leadership Continuity			Vendor Relationship			Engagement Scores								
Previous	Current	Trend	Previous	Current	Trend	Previous	Current	Trend	Previous	Current	Trend	Previous	Current	Trend	Previous	Current	Trend	Previous	Current	Trend	Engagement			Enablement					
G	G	→	G	G	→	G	G	→	G	A	→	G	G	→	G	G	→	G	G	→	G	G	→	Previous	Current	Trend	Previous	Current	Trend
25.4	Delayed by 1-week	Expected downward trend due to possible CRs from PfM	£315k	of revenue contingency approved to fund unforeseen testing resource cover					QA processes for Testing taking longer to agree than planned, causing testing delays			Benefits defined and baseline measurements taken			Several leadership vacancies			No concerns			February – 5.0	April – 5.1	May – 4.7	(out of 6)	February – 5.1	April – 5.1	May – 5.0	(out of 6)	

Risks and Issues

Type	ID	Description	Inherent Risk		Mitigation Actions / Resolutions	Residual Risk	Owner
			Impact	Likelihood			
R	Prg-071	The plan is based on development estimates. As we haven't proven these estimates and how long it takes to convert a module of Pulse, there is a risk the programme doesn't deliver to plan and requires increased investment.	5	3	• Reducing likelihood due to increased confidence in ROM estimates following completion of a growing number of detail specifications. Actual effort consistent with detail estimates.	Very High	CA
R	Prg-070	New demand such as Plasma for the manufacturing of medicines (PfM), Convalescent plasma (CVP) or other unforeseen demand may impact timelines and capacity and place heavy workloads upon key individuals.	3	4	• Reducing impact owing to deployment of new ways of working (i.e.: detail release plans enable rapid impact assessments to support decisioning and mitigation planning). • Reducing likelihood due to improved long-term planning (i.e.: deployment of an effective demand management process and increased visibility of potential PFM demand).	High	CA
R	Prg-079	There is a risk to filling vacancies in a timely manner and with strong candidates at the banding assigned and for FTC contracts depending on candidates that are available and choose to apply	3	3	• Reducing impact and likelihood due to appointment of key roles and a smaller residual proportion of roles being vacant. CR raised and approved by Programme Board to align residual recruitment with detail delivery plans.	High	CA

Summary (Jun)	
Approved budget (£k)	£ 4,483
May Spend (£k)	£ 264
Cumulative Spend (£k)	£ 577
Forecast for this FY (£k)	£ 4,564
<b>Status</b>	<b>On Track</b>

Green	On track with no major risks or issues
Amber	On track but major risks
Red	Issues impacting delivery
Grey	Not commenced
Blue	Complete

Budget Update

Green	On track with no major risks or issues
Amber	On track but major risks
Red	Issues impacting delivery
Grey	Not commenced
Blue	Complete

# Progress against scope

The table below shows the % complete of total programme scope over time in each area. The last row of the table shows the % of total budget (excluding contingency) spent. Taken together, the table shows the % of budget spent to achieve a % of scope. The % complete takes account of the estimated effort involved, and the complexity of the work is a contributing factor in the estimating process. Please refer to the appendix for further detail on the method of calculation.

Tracking the Cumulative Delivery and Budget Over Time															
	FY20/21 Target	FY20/21 Actual	May '21 Plan	May '21 Actual	Jul '21 Plan	Jul '21 Actual	Sep '21	Nov '21	Jan '22	Mar '22	FY21/22 Target	FY22/23 Target	FY23/24 Target	FY24/25 Target	FY25/26 Target
Product Centre Enablement	75%	75%	81%	81%	86%	84%	92%	96%	100%	100%	100%				
Legacy Delphi Delivery	n/a	51%	51%	51%	51%	70%*	51%	100%	100%	100%	100%				
C# Upgrade	- Requirements Definition	15%	13%	13%	25%	30%*	46%	46%	53%	57%	50%	80%	95%	100%	
	- Design and build	5%	6%	6%	7%	8%	10%	10%	14%	17%	tbc	25%	50%	75%	100%
	- Test	0%	0%	0%	2%	0%	3%*	0%	9%	10%	tbc	20%	45%	70%	100%
	- Accept and Deploy	0%	0%	0%	0%	0%	0%	0%	0%	10%	tbc	15%	40%	65%	100%
	- Decommission	5%	0%	0%	0%	0%	0%	3%	3%	5%	9%	10%	30%	55%	80%
Data Ecosystem & Power BI	0%	0%	0%	0%	0%	1%	tbc	tbc	tbc	20%	20%	75%	100%		
Database Modernisation	0%	0%									0%	5%	25%	50%	100%
Integration Modernisation	0%	0%	0%	0%	0%	1%	tbc	tbc	tbc	5%	5%	10%	25%	75%	100%
Budget % of overall (excl. VAT)	n/a	12%	15%	15%	19%	19%	22%	26%	29%	31%	31%	47%	64%	80%	98%

84% July actual for Product Centre Enablement due to the pushback on Business enablement activities whilst we re-establish the test team capability

Delivery estimates have yet to be proven, and therefore ability to forecast accurately is limited. Increased confidence in estimates is expected over coming months as team's experience increases; further forecasts will be released over the Summer.

(\*) = delivery progress includes work-in-progress, subject to milestone approval

## Key Delivery Milestones

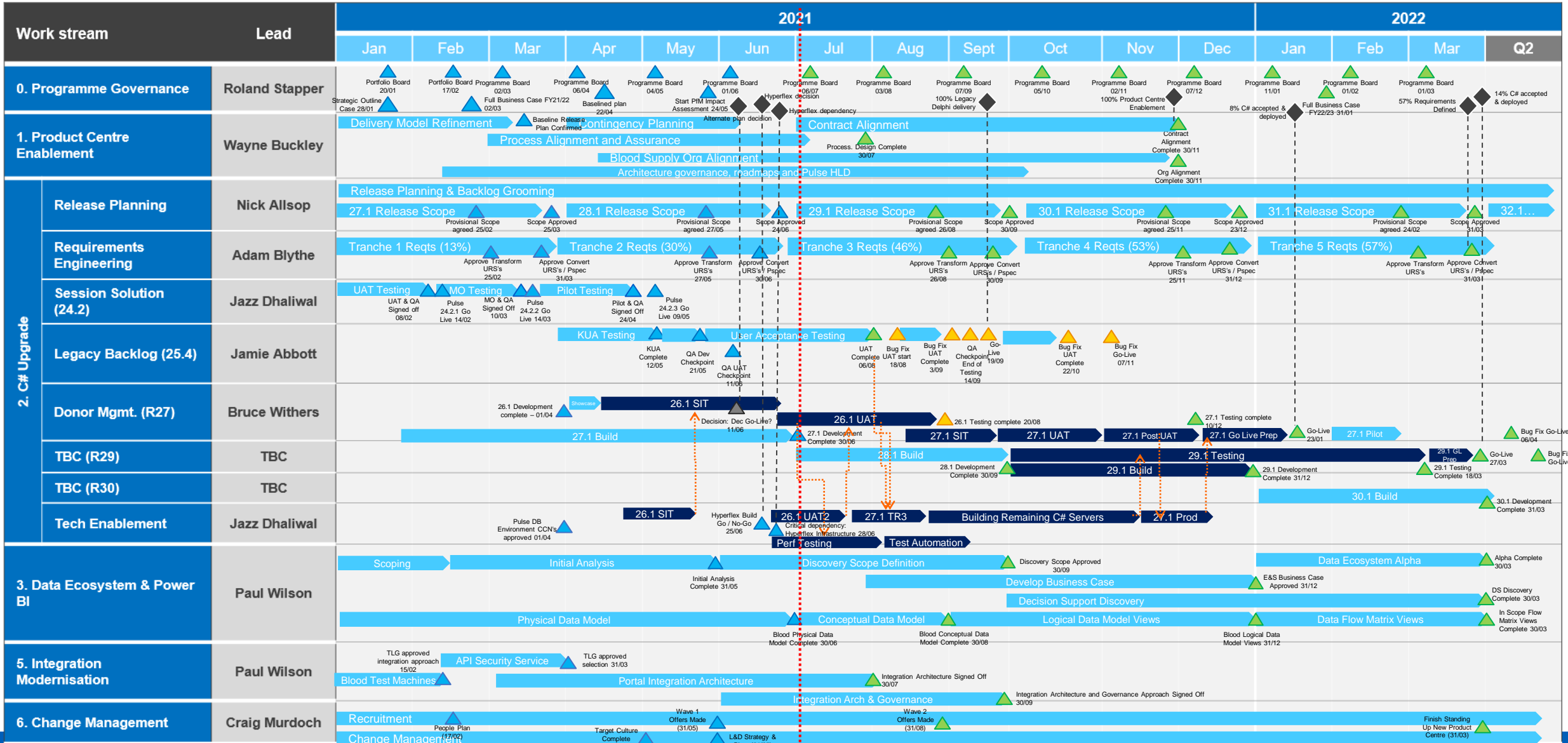
Workstream	Milestone Description	Baseline Date	Forecast Date	RAG	Commentary
C# Upgrade	Donor Management (R27) Build Complete	30/06	30/06	C	Complete
Change Management	Wave 1 Offers Made	31/05	31/05	C	Complete
Legacy Delphi Delivery	25.4 Go Live	19/09	26/09	A	Anticipate 1-week delay to go-live due to resource constrains
C# Upgrade	Donor Management (R28) Build Complete	30/09	30/09	G	

# Integrated Programme Plan



Blood and Transplant

<b>Green</b>	On track with no major risks or issues	<b>Milestone</b>	<b>Key</b>
<b>Amber</b>	On track but major risks	<b>Activity</b>	
<b>Red</b>	Issues impacting delivery	<b>Critical path</b>	
<b>Grey</b>	Not commenced	<b>Key dependency</b>	
<b>Blue</b>	Complete		



# Supporting slides

# A1: Key performance indicators explained

KPI	Measure	Green	Amber	Red
<b>Progress against plan</b>	Milestone progress against plan	No significant issues or delays with delivery and acceptance of milestones/deliverables. Confidence of Level 1 milestones/deliverables delivery and acceptance on time >80%.	Minor delays, significant issues require short term attention, milestones/deliverables may miss target. Confidence of Level 1 milestones/deliverables delivery and acceptance on time 60-80%.	Major issues / delays, require immediate attention, will not meet target for milestones/deliverables. Confidence of Level 1 milestones/deliverables delivery and acceptance on time <60%.
<b>Budget/spend</b>	Budget remaining vs. forecast to end of FY	Finances are under control and within tolerances set. <b>Under-spend:</b> If no tolerances set, then any favourable variance is within 90 -100% of Budget.	<b>Over-spend (forecast or actual):</b> Finances require attention and may exceed tolerances set. There are issues but these can be resolved with short term action. Formal application for draw-down of any contingency fund will be required. <b>Under-spend:</b> If no tolerances set, then any favourable variance forecast is between 85% & 90% of Budget.	<b>Over-spend (forecast or actual):</b> Financial viability of the programme is under question and requires significant attention. Forecast to exceed contingency fund identified in the Business Case. If forecast spend is in excess of the lower of 10% or 100k of budget, then the business case must be revisited: additional funding is required subject to relevant approval. <b>Under-spend:</b> If no tolerances set, then any favourable variance forecast is below 85% of Budget or £100K under-spend whichever is smaller.
<b>Scope</b>	No. of major and minor CRs in last year	Scope is under control with only minor changes to a limited number of deliverables, which do not affect time, cost and required outcomes of the programme.	Changes or additional deliverables have been requested which will negatively impact time and cost or delivery of other deliverables. There is a risk that "scope creep" may threaten the programme. Formal Change Control is underway.	Changes or additional deliverables have been requested which will impact time and cost or delivery of other deliverables. These will significantly impact time and cost and other indicators beyond agreed tolerances.
<b>Quality</b>	Delivery to Customer's Quality expectations (including GMP & MHRA requirements)	Customer Quality requirements are clear and milestones/deliverables delivered to customer are meeting or will meet customer quality requirements	Some Customer Quality requirements are unclear or there is pushback on the quality of some milestones/deliverables, but these can be rectified without impacting overall programme delivery.	Potentially serious regulatory / quality issues which would prevent programme outcomes becoming accepted into service. Customer is pushing back on the quality of milestones/deliverables being delivered or Customer Quality requirements are unclear. This will severely impact the overall programme delivery and customer acceptance.
<b>Benefits</b>	Benefits progress against plan	No significant issues or delays in realising benefits - will hit or exceed the target.	Minor delays or minor reduction is expected against the benefits defined in the business case. If no tolerance set, then will be within 5% of Business Case.	Viability of the programme is under question from a benefits delivery perspective. Major delays in delivery or significant reduction in expected benefit - reduction in benefit is greater than 5%.
<b>Leadership continuity</b>	% change in leadership in last quarter – includes SRO and product centre LT	No or minor leadership changes	Several leadership changes over short period of time, which can be mitigated through thorough handovers. New leaders continue programme delivery as per Business Case and plans.	Leadership changes without thorough handovers, leading to loss of expertise. New leaders alter programme course, impacting on programme delivery.
<b>Vendor relationship</b>	Vendor relationship as scored by SRO and AD	No concerns or minor concerns.	Diversion of opinion on some topics and/or strained communications, which can be addressed without impacting overall programme delivery.	Significant diversion of opinion and strained communications, which will severely impact the overall programme delivery.
<b>Engagement scores</b>	Monthly programme engagement score metrics on knowledge and engagement	Good engagement scores (4.5 to 6 out of 6).	Mediocre engagement scores (3 to 4.5 out of 6) or sudden drop in scores.	Poor engagement scores (0 to 3 out of 6) or sudden large drop in scores.

# A2: How delivery % is measured for tracking and reporting

Tracking the Cumulative Delivery and Budget Over Time														
	FY20/21 Target	FY20/21 Actual	May '21 Plan	May '21 Actual	Jul '21	Sep '21	Nov '21	Jan '22	Mar '22	FY21/22 Target	FY22/23 Target	FY23/24 Target	FY24/25 Target	FY25/26 Target
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## How C# and Delphi delivery % is measured

- A list of in-scope C# and Delphi elements has been baselined.
- C# and Delphi elements have an estimate for the percentage of overall work that they represent.
  - Estimates are reached through a calculation of lines of code, forms (GUI) and an experience factor.
- Delivery of in-scope elements over time has been planned and baselined.
- Percentage delivery of the total is shown in a table over time, with baseline vs. actual progress.

## How Product Centre Enablement delivery % is measured

- Product Centre Enablement progress is assessed based on resource allocation over time until the final milestone.

## How Blood Power BI and Integration Modernisation delivery % are measured

- Blood Power BI and Integration Modernisation are mobilising in Q2. Initial activities will be discovery and detailed deliverables planning.
- The delivery percentage plan was based on a high-level estimate and will be firmed up as planning gets under way.

## How Budget % is measured

- Cumulative actual (when available) or forecast (for future dates) spend is divided by the total budget excluding contingency.

# A3: Alt Test Sourcing Model CR - BTMCR-2021.01

Ref	Title	Description	Drivers	Budget
<a href="#">BTMCR-2021.01</a>	<b>Alt Test Sourcing Model</b>	<p>We will temporarily augment the Testing team with up to 6 partner resources through a Government Cloud tender.</p> <p>The trained resources need to be supplied very quickly and stay through to Go-Live of the first C# release early 2022.</p> <p>In anticipation of this CR being approved, a zero-commitment tender was issued to seven potential partners; with responses due back on 22/06. Resourcing Partner, Edge was appointed on 28/06 with the new team mobilising from 5th July.</p>	<p>An acute resource shortage in the Testing team developed, due to several factors:</p> <ul style="list-style-type: none"> <li>• Upcoming maternity leave (BTM Test Manager)</li> <li>• Resignation of existing skilled resource</li> <li>• Contracts of existing FTC resources ending with individuals not committing to extend</li> <li>• Unplanned absence due to ill health</li> <li>• The recruitment of new Perm and FTC resource taking longer than anticipated</li> <li>• A backlog building up in Testing team due to current resource shortage</li> </ul>	<p>The approved budget for FY21/22 excluding VAT and contingency is £4,168,000. Contingency for the year is £500,000.</p> <p>This CR is for a FY21/22 budget increase of £315,000. This is made up of a total tender value of £459,000 and a contribution out of the existing budget for Testing of £143,000. The £143,000 relates to funding previously allocated to test resource not presently in post and the deferral of some FTC post appointments to better align with release delivery plans. Of the £315,000 increase, £95,000 relates to maternity leave cover which would normally be handled as a BAU cost pressure.</p> <p>The increase of £315,000 is within the Revenue budget contingency of £400,000, and within the £700,000 approval authority of the Portfolio Board.</p> <p>Approval of this CR will increase the approved FY21/22 programme budget from £4,168,000 to £4,483,000.</p> <p>This CR has no impact on the budget of future years.</p>