

NI Gateway Review 0: Strategic assessment

Programme Title: Public Sector Shared Services Programme (PSSSP)

Risk Level: Very High Risk

NI Gateway ID: GWY/000/790

Privacy Marking: OFFICIAL

Programme Title: Public Sector Shared Services Programme (PSSSP)

Version number: FINAL

Date of issue to SRO: 22 June 2017

SRO: Sir Malcolm McKibbin

Department: Department of Finance

NI Gateway Review dates: 13/06/2017 to 16/06/2017

NI Gateway Review Team Leader:

Chris Shoukry

NI Gateway Review Team Members:

Liz McLoughlin

Bob Assirati

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NI Gateway Delivery Confidence Assessment

<u>Delivery Confidence Assessment</u>	<u>Amber Red</u>
<p>The Review Team defines Delivery Confidence Assessment in this instance as being on the likelihood <u>at this stage</u> of successful delivery of the Programme Mandate. The mandate, derived from the Stormont Agreement, is to look at ways of extending shared services in order to contribute to achievement of greater cost efficiency and improved quality in the delivery of services to and by the public sector.</p> <p>Our assessment of readiness reflects a balanced judgement on both the strategic position of the Programme and the more tactical preparation.</p> <p>The Programme has a number of strengths:</p> <ul style="list-style-type: none">• There is visible and engaged strategic leadership,• There is very strong and competent programme and project leadership• There has been a significant amount of research and review of lessons learned from experience elsewhere• A Transformation Partner is being appointed to augment existing skills and achieve skills transfer.• The extensive current benchmarking work should give the programme leadership sound evidence against which to evaluate options. <p>However, there are 3 key concerns underpinning our assessment:</p> <ul style="list-style-type: none">• The focus in the Vision should align closer to the strategic outcomes rather than on an organisational solution;• At this stage, there are no quantifiable objectives for the Programme and thus no basis for assessing delivery confidence;• There is a questionable assumption that the greater the extent of shared services, the greater the achievable benefits <p>Therefore, our overall assessment at this stage is Amber Red since we cannot be confident that the programme will lead to the strategic outcome, i.e. substantial improvement in service delivery.</p>	

The Delivery Confidence assessment RAG status should use the definitions below.

<u>RAG</u>	<u>Criteria Description</u>
Green	Successful delivery of the project/programme to time, cost and quality appears highly likely and there are no major outstanding issues that at this stage appear to threaten delivery significantly

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Amber/Green	Successful delivery appears probable however constant attention will be needed to ensure risks do not materialise into major issues threatening delivery
Amber	Successful delivery appears feasible but significant issues already exist requiring management attention. These appear resolvable at this stage and if addressed promptly, should not present a cost/schedule overrun
Amber/Red	Successful delivery of the project/programme is in doubt with major risks or issues apparent in a number of key areas. Urgent action is needed to ensure these are addressed, and whether resolution is feasible
Red	Successful delivery of the project/programme appears to be unachievable. There are major issues on project/programme definition, schedule, budget required quality or benefits delivery, which at this stage do not appear to be manageable or resolvable. The Project/Programme may need re-baselining and/or overall viability re-assessed

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Summary of Report Recommendations

The Review Team makes the following recommendations which are prioritized using the definitions below.

Ref. No.	Recommendation	Critical/ Essential/ Recommended	Classification
1.	The SRO and Programme Board should agree now that the options work and resultant OBC will focus on the objectives of the Programme rather than an organisational solution.	Critical	Context, Aim and Scope
2.	The SRO should ensure that the OBC work includes identification of tangible and measurable benefits to be derived from the programme.	Essential – by March 2018	Benefits Management
3.	The Programme will need to track the benefits being delivered through other initiatives and ensure they are not double counted.	Essential - ongoing	Benefits Management
4.	The Programme should further develop the detail of its Stakeholder and Engagement Strategy and Plan.	Essential – by September 2017	Stakeholder Management
5.	The Programme Board should hold a workshop to set the basis for programme direction over the coming months.	Critical – next 6 weeks	Governance
6.	The Programme should ensure that the focus and pace of programme team activity is maintained in order to achieve a timely and high quality OBC, while the Programme Board considers future strategy and direction.	Critical	Programme and Project Management

Critical (Do Now) – To increase the likelihood of a successful outcome it is of the greatest importance that the programme/project should take action immediately

Essential (Do By) – To increase the likelihood of a successful outcome the programme/project should take action in the near future.

Recommended – The programme/project should benefit from the uptake of this recommendation.

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Background

The aims of the programme:

The stated Vision for the Programme is to:

‘Establish a new entity that is collectively owned by the participating sectors which provides a range of innovative, high quality and cost effective back office services to the NI public sector.’

The strategic outcomes identified for the programme are:

- Delivery of high quality shared services.
- Delivery of lower cost services.
- Increase participation in shared services:
- Exploit opportunities to grow the NI economy.

The driving force for the programme:

The NI government recognises the need to create economies of scale and value for money in the context of constrained budgets by, amongst other measures, reducing the cost of back office services across the public sector in line with public and private sector benchmarks.

The Stormont House Agreement (December 2014) and Fresh Start Agreement (November 2015) included a commitment to the extension of shared services across the NI public sector.

In January 2015, the then DFP Minister submitted an Executive Paper – Public Sector Restructuring and Reform that included a section aimed at extending the use of shared services across the NI public sector.

This was further amplified and reinforced by a DAO letter dated March 2015.

The procurement/delivery status:

The Programme is in the process of procuring a Transformation Partner to assist with the development of an Outline Business Case. It is also in the process of gathering evidence to support the Outline Business Case for future delivery of the services.

Current position regarding NI Reviews Reviews:

This is the first Gateway Review for this Programme

Purposes and conduct of the NI Gateway Review

Purposes of the NI Gateway Review

The primary purposes of an NI Gateway Review 0: Strategic assessment, are to review the outcomes and objectives for the programme (and the way they fit together)

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and confirm that they make the necessary contribution to Ministers' or the departments' overall strategy

Appendix A gives the full purposes statement for an NI Gateway Review 0.

The Review Team notes that this review is taking place at a very early stage in the Programme development.

Conduct of the NI Gateway Review

This NI Gateway Review 0 was carried out from 13 June 2017 to 16 June 2017 at Goodwood House, Belfast. The team members are listed on the front cover.

The people interviewed are listed in Appendix B.

The Review Team would like to thank the SRO, the PSSSP Programme Team and all those interviewed for their support and openness which contributed to our understanding and the outcome of this review. We would also like to thank Colm Doran, Kirstie Murray and Briega Bailie for their excellent administrative support throughout the review.

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Findings and recommendations

1: Strategic and Business Context

The Public Sector Shared Services Programme (PSSSP) has been established to progress a political mandate which derives from the Stormont House Agreement. This mandate sets out a comprehensive programme of public sector reform encompassing a commitment to the extension of shared services.

The Review Team (RT) found universal support for the principles of extending shared services across the public sector to achieve lower costs (especially freeing up resource for the front line) and improved service to end users, especially in a period of acute financial pressures.

The Programme therefore has a strong strategic fit with Ministerial direction for Northern Ireland. However, there was considerable scepticism about whether such an ambitious programme will develop enough traction and impetus to overcome resistance caused by the variation in business requirements between the sectors and organisational sensitivities, especially where it is regarded as a threat.

In part, the defensiveness of sectoral organisations is exacerbated by the vision statement of ‘Establish a new entity that is collectively owned by the participating sectors which provides a range of innovative, high quality and cost effective back office services to the NI public sector.’

Overall, the challenge is not to persuade people of the benefits of Shared Services but to overcome concerns about future political will, deliverability and service levels.

2: Business Case and Management of Outcomes and Benefits

Business Case

The vision for the Programme set out in the Strategic Outline Case of May 2016 is to ‘Establish a new entity that is collectively owned by the participating sectors which provides a range of innovative, high quality and cost effective back office services to the NI public sector.’

We comment above on the strong mandate for the extension of shared services in the Northern Ireland public sector. The vision statement, however, appears to go further than this in prescribing that the vehicle for delivery of those shared services will be a new, single entity. The RT notes that this statement appears in the Strategic Outline Case which was approved by the Programme Board in May 2016.

This raises a number of potential issues. For example, there is a risk that the real driver behind the reform – the need for more efficient and better quality services to the

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end user – will be lost in the debate over the means. Participation by the existing shared service organisations in the objective and well evidenced work on scope and evaluation of options is vital to its success. There is, however, a real risk that current providers will concentrate instead on concerns about the future of their organisations and the deployment of arguments against what appears to be a pre-determined solution.

It is striking that all of the sectors involved in the Programme are undergoing, or have recently undergone, significant restructuring and are at different stages in their own change programmes. This adds additional challenge.

The programme team has undertaken, and continues to undertake, a significant amount of research into the establishment of shared services, drawing on the 10 years of shared services experience within the NI public sector and the experience of public and private sector organisations elsewhere. The team has drawn together lessons learned and identified a number of critical success factors. The programme has recently issued Baseline Questionnaires across HR (and payroll), IT and Finance to some 90 organisations across the public sector.

The provision of information and its quality assurance and analysis will be a major exercise, but the intended result is the establishment of sound evidence to support decisions on scope and subsequently on options. It is intended that the high level findings along with proposals for scoping will be presented to the Programme Board in September. With further analysis and agreed scoping criteria the Board will then have the evidence to support agreement on the scope for the next generation of shared services. Subsequently, the Board will agree the range of options to be considered and the criteria against which they will be evaluated, leading to the production of an OBC in March 2018.

It is critical to a successful OBC process (and, therefore, to Programme success) that the options appraisal is open, objective, thorough and persuasive. The solution or solutions must emerge from the argument and should not appear to be assumed at the start of the process. As previously pointed out in this report, the vision for the Programme as presently stated appears to focus on an organisational solution rather than the driving purpose for the Programme.

The end point should, in our view, be better quality and more efficient services and there should be open debate based on sound evidence as to how, when and to what extent that is likely to be achieved. The Programme Board will need to balance constraints of cost, time and deliverability against opportunities. For example:

- There are clear efficiencies to be gained from greater standardisation of services but there are also clear risks in not meeting essential end user needs and having to make significant compromises to customise the “standard” in order to do so. The RT has concerns about the assumption that the greater the scale of shared services the greater the benefits. We believe that further

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lessons might be learned from cases elsewhere in which increased scale and complexity, such as radically different business requirements, have led to diminishing returns.

- Pursuing areas where there is clear existing commonality is lower risk but also lower benefit.
- Phasing of implementation brings some early wins but risks halting progress towards a more innovative solution.

Against this background, the RT recommends that the SRO and Programme Board ensure that the objective of the Programme for improved and efficient services is more clearly stated in the Business Case and other key documents. This should not lead to delay or redirection of existing effort but should ensure that the ensuing debate is better focussed.

Recommendation 1: The SRO and Programme Board should agree now that the options work and resultant OBC will focus on the objectives of the Programme rather than an organisational solution.

The Programme Board has agreed principles that should underpin the programme. These will be refined through engagement with the Strategic and Customer Advisory Groups.

Outcomes and Benefits

All those interviewed said that it was important that the way ahead should be informed by an understanding of the user need and that users should be engaged in the process. Without this work, interviewees thought that it would be difficult to 'sell' the Programme. We agree with this and have commented further later in the report. If this is to be done effectively, the Programme will need to articulate its desired outcomes in a way that has meaning and clear advantage for those using, and providing, the future services.

Programme documentation sets out a number of strategic outcomes - for example, 'delivery of improved customer experience' and 'improved business intelligence information'. These very broad outcomes will need to be turned into a set of tangible and measurable benefits and these will need to be set out, even if not fully worked through, in the OBC.

Recommendation 2: The SRO should ensure that the OBC work includes identification of tangible and measurable benefits to be derived from the programme.

We note that a proportion of the potential benefits (savings and service improvement) will be realised by shorter term initiatives which are either already under way or planned within the participating sectors and care should be taken to ensure PSSSP benefits factor these in. This needs to be explicitly recognised both in the OBC and the subsequent benefits work.

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Recommendation 3: The Programme will need to track the benefits being delivered through other initiatives and ensure they are not double counted.

3. Stakeholders

The current stakeholder landscape for this Programme is highly complex and has a significant spread in terms of sectoral interests, operational impact, organisational complexity and maturity, and levels of experience in implementing and/or using shared services.

Of the 3 participating sectors, both health and central government have some experience of shared services and have their own organisations set up for that purpose; the Business Services Organisation (BSO) for health and the Enterprise Shared Services organisation (ESS) for central government. These two latter organisations have very different organisational constructs and remits and could be, to an extent, viewed as being rivals. The other major participating sector, education, has less experience of shared services and is in the middle of the largest transformation of the sector in the last 40 years in Northern Ireland, having recently been formed from 5 Education and Library Boards and a number of smaller educational organisations into one Education Authority (EA).

All 3 sectors have Permanent Secretary and Chief Executive representation on the Programme Board. Other significant stakeholders include the Trades Unions who are not represented on the Programme Board and who have expressed concerns regarding the Programme. Local Authorities have observer status on the Programme and attend the Programme Board.

The RT found that, whilst concerns were expressed by some as to the degree of real buy-in from some participants, there was consistent agreement on the principle of making best use of scarce resources through sharing services where appropriate. There were however widely differing views as to the strategy for doing that and, in some cases, the timing.

Senior stakeholder commitment is often demonstrated by regularity of attendance at senior governance forums and the RT noted that attendance of Permanent Secretaries and CEOs at the PSSSP Programme Board is generally high.

We noted that stakeholder engagement is also being undertaken by the Programme Team on a one to one basis, primarily through the senior management team but also by means of having representatives of the participating sectors embedded within the Programme.

Engagement with the Trade Unions appears to have got off to a somewhat tense start but appears to be on a more positive trajectory now. The Programme Team is

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awaiting the Trade Unions' draft terms of reference for a forum to facilitate discussions between the TUS and the respective departments.

Concerns were expressed that whilst the sectors are represented at very senior governance level, engagement with end users at the operational level is also vital both to gain their buy-in and to ensure that the design of the service options is truly representative of user needs. The RT is unclear as to whether the current level of engagement is sufficient to win hearts and minds and whether the current messages from the Programme are sufficient to "sell" its benefits to the end user recipients i.e. answer the question "what is in this for me and how can it make my life better/easier?".

We were reassured to hear some Programme Team members note the need to ensure detailed design reflects the needs of the end user but further note that in order to establish a sustainable basis of enduring stakeholder support, the Programme needs to ensure it has a "bottom up" groundswell of buy-in as much as top down strategic support. To that end, the RT feels that the current rather generic Stakeholder and Engagement Strategy (draft November 2016) needs to be strengthened and personalised to the Programme to reflect its unique and highly complex stakeholder landscape and take account of the comments made in this section. This should also take account of the specific operational and organisational challenges being faced by particularly health and education and a recognition of potential need for phasing in terms of entry point.

Recommendation 4: The Programme should further develop the detail of its Stakeholder and Engagement Strategy and Plan.

It is worth noting here that the Programme has recently set up a Customer Advisory Group (CAG) to provide guidance to the Programme Board. The RT commends this approach but notes that further work needs to be done to refine its membership and terms of reference as well as its interface with the proposed Strategic Advisory Group (SAG).

The Programme constitutes a long-term endeavour and the need for enduring and strong stakeholder support from all participants cannot be overstated. The degree of risk to success from a lack of sustained stakeholder support is equally high. Lack of success will mean a significant impact on achieving the much-needed benefits – both financial and operational – with consequent knock-on impact on the ability of the NI government to fund other/better services with the financial savings anticipated and the ability of sectors to improve the quality and quantity of their services for less financial outlay.

4: Risk management

The RT notes the critical role of effective risk management at all levels in the successful delivery of the outcomes and benefits of projects and programmes.

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The RT is content that a suitable approach to programme management is maturing and advocates that the team continue to make pragmatic use of programme and project management methodologies to provide an appropriate level of assurance to the Programme Board.

The programme risk management approach is still maturing. Whilst a high-level Risk Register is contained in the Programme Board papers and sets out the top 8 current risks to the Programme, 2 of which are Red and 6 Amber, the extent of Programme Board discussion of and direction on risk management and individual risks is unclear. The Programme Board has a responsibility to identify strategic risks which may not be obvious to the programme team.

Initial versions of Risk and Issue Management Strategies are going to the June Programme Board. Risk and Issue registers are in place for the individual projects, and are being populated. At this stage, the processes for risk management are still being developed. The RT recommend that individuals, as opposed to groups, are listed as risk owners against each risk.

At this stage, where measurable outcomes and timescales have not been defined it is not possible to quantify the impact of these risks on time, cost or quality. This should be more achievable post-OBC.

5: Review of current phase

Although the mandate for this Programme appeared in 2015, changes in the political environment prevented progress for some time. However, since November 2016 progress has resumed, with regular meetings of the Programme Board, and staffing of the Programme Team with expertise from the separate sectors. Considerable effort has gone into learning lessons from other Shared Services programmes, and papers have been produced on lessons learned and on literature reviews. A Research Questionnaire Exercise was conducted in January 2017.

Due to the delays in 2015 and 2016 it is not possible to say that the Programme is on track, but progress is now being made. There is strong leadership, acknowledged by all those we spoke to and the emerging governance structure is appropriate for this stage. The RT is impressed with the skills and enthusiasm of the Programme Director and Project Team leads. Whilst resources appear to be sufficient at this stage, we note that the team is not large and there is a risk that they may struggle with available resources as activity intensifies in this current period. This needs to be closely monitored.

The current phase, to the end of the financial year, will involve the engagement of a Transformation Partner to support the development of the Outline Business Case. The appointment of a Transformation Partner will be critical in supporting the internal team capabilities towards the development of an OBC which focuses on the strategic outcomes for the programme and the roadmap for their achievement which in itself will

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be a key stakeholder engagement tool. The Programme Director has made it clear to the review team, this partner will be embedded within the PSSSP team to maximise skills transfer and enable close monitoring of output and deliverables.

Baseline information for this is being collected through Questionnaires to be completed by 90 user organisations on their use of Finance, HR and IT services. These detailed questionnaire responses are due back in June and July and will require an extended period of intensive analysis to establish volumes, costs and potential benefits. The Programme Team is also developing the Programme Brief and strengthening Programme Controls. The RT notes that, in addition to the controls being developed, a Resource plan for future phases is needed, together with a documented process for decision making and recording of decisions. We further recommend that an integrated assurance and approvals plan (IAAP) is developed to avoid delays in approvals at key stages. The programme team has done a lot of good work in gathering lessons learned and identifying critical success factors. These could be used to develop a matrix against which programme progress and effective risk management can be judged.

The Programme has secured funding of £1.5m for 2017/8 which covers internal costs and those of the Transformation Partner, despite no formal budgets due to the political situation. There is no forward funding position at present.

The Programme is about to enter a period of intense activity that will set the basis for successful delivery of the programme, the programme team is developing the programme tools and controls and the SRO has recently changed. Given the comments in this report on the importance of continued senior leadership and concentration on strategic issues, now would seem to be an appropriate time for a session with the Permanent Secretaries, CEOs and other Board members to revisit the vision and to clarify what is expected from the OBC. They should also agree how they will operate over the coming months, what the key risks and issues will be and what support they will be looking for from the programme team. The respective roles of SRO, Deputy SROs and Programme Director should be agreed and documented.

Recommendation 5: The Programme Board should hold a workshop to set the basis for programme direction over the coming months.

There will be a major decision point for the Programme when the OBC is considered. The Programme Board action recommended above should not in any way delay or hinder the current programme team activities which must be continued at pace in order to build the evidence base for the OBC decision.

Recommendation 6: The Programme should ensure that the focus and pace of programme team activity is maintained in order to achieve a timely and high quality OBC, while the Programme Board considers future strategy and direction.

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6: Readiness for the next phase

Under the current programme plan, the OBC will be completed by 30 March 2018 and it is expected that the subsequent approval process will take upwards of 6 months. The key milestone prior to this will be the December Programme Board decisions on the service scope, the options for the delivery model (to be taken forward in the OBC) and the strategy for on-boarding.

The approvals process will need to be carefully managed and we heard that key players in what will be the peer review process are being engaged. The Departmental Economist is a particular example. At some stage nearer the time the Programme Team should set out the plan for supporting the process with the appropriate resources.

It is possible that, despite support to and careful management of the process, OBC approval may take rather longer than six months. During this time, normal business will not stand still and there is a risk that engagement will be lost. The continued commitment and leadership of Programme Board members will be important in mitigating this risk and the Programme Team will need to have a worked through engagement plan.

Benefits mapping, resource planning, risk management and the development of the procurement strategy are key activities for this phase as is the need to ensure the data base is refreshed. The Programme Team will need to have a clear and credible programme and resource plan.

The next NI Gateway Review:

The RT recommends a further Gate 0 Strategic Review (blended with elements of Gate 2 delivery strategy) prior to issue of the Outline Business Case currently slated for March 2018.

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APPENDIX A

Purposes of NI Gateway Review 0: Strategic assessment

- Review the outcomes and objectives for the programme (and the way they fit together) and confirm that they make the necessary contribution to overall strategy of the organisation and its senior management.
- Ensure that the programme is supported by key stakeholders.
- Confirm that the programme's potential to succeed has been considered in the wider context of the organisation's delivery plans and change programmes, and any interdependencies with other programmes or projects in the organisation's portfolio and, where relevant, those of other organisations.
- Review the arrangements for leading, managing and monitoring the programme as a whole and the links to individual parts of it (e.g. to any existing projects in the programme's portfolio).
- Review the arrangements for identifying and managing the main programme risks (and the individual project risks), including external risks such as changing business priorities.
- Check that provision for financial and other resources has been made for the programme (initially identified at programme initiation and committed later) and that plans for the work to be done through to the next stage are realistic, properly resourced with sufficient people of appropriate experience, and authorised.
- After the initial Review, check progress against plans and the expected achievement of outcomes.
- Check that there is engagement with the market as appropriate on the feasibility of achieving the required outcome.
- Where relevant, check that the programme takes account of joining up with other programmes, internal and external.

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Name	Role	Department/Sector
David Sterling	Permanent Secretary Deputising for SRO	Dept of Finance
Colm Doran	PSSSP Programme Director	Dept of Finance
Liam McIvor	Chief Executive BSO (Deputy SRO PSSSP)	HSC Business Services Organisation
Richard Pengelly	Permanent Secretary DoH and CEO of Health and Social Care NI	Dept of Health
Derek Baker	Permanent Secretary	Dept of Education
Kirstie Murray	Transformation, Stakeholder Engagement & PMO Project Lead	PSSSP
Lisa Mulllan	Finance Project Lead	PSSSP
Paul Wickens	Chief Executive ESS (Deputy SRO PSSSP)	Enterprise Shared Services Dept of Finance
Stephen Porter	ICT Project Lead	PSSSP
Karen Cheyne	HR Project Lead	PSSSP
Dr Theresa Donaldson	Lisburn Castlereagh Council	SOLACE
Sir Malcolm McKibbin	Head of the Civil Service (HOCS) and PSSSP SRO	NICS
Gavin Boyd	Chief Executive EA (Deputy SRO PSSSP)	Education Authority
Alison Millar	General Secretary	NIPSA
Tom Gilgunn	Deputy Director	CPD
Damien McAlister	Chair of Customer Advisory Group for PSSSP	Belfast Health Trust
Mark Bailey	Strategic HR Business Partner	NICS HR

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APPENDIX C

Recommendations from previous NI Gateway Review

Not Applicable – this is the first Gateway Review for this Programme



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