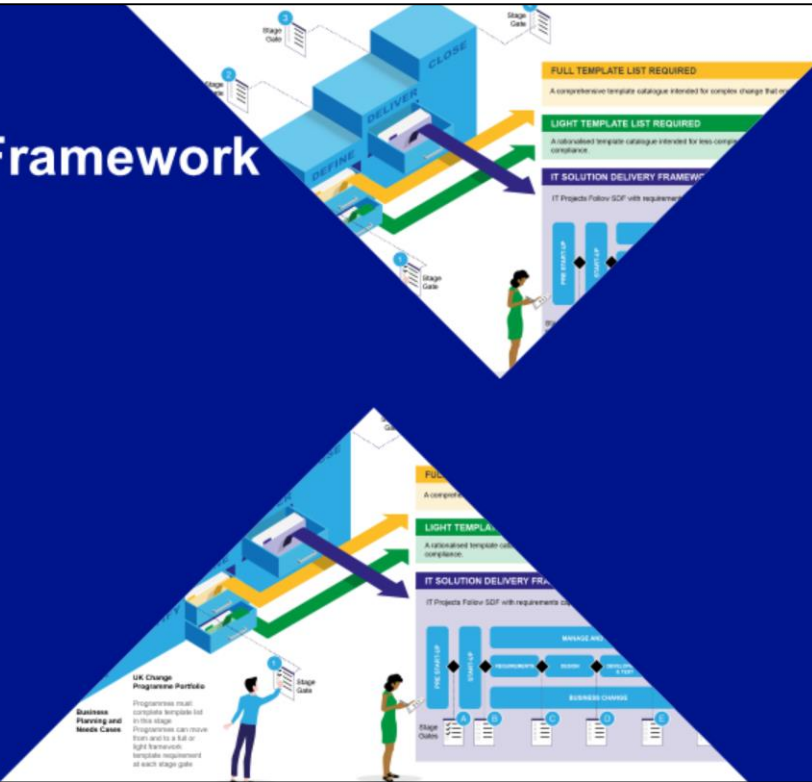


Change Delivery Framework Overview

V10

UK Change 2020
nationalgrid



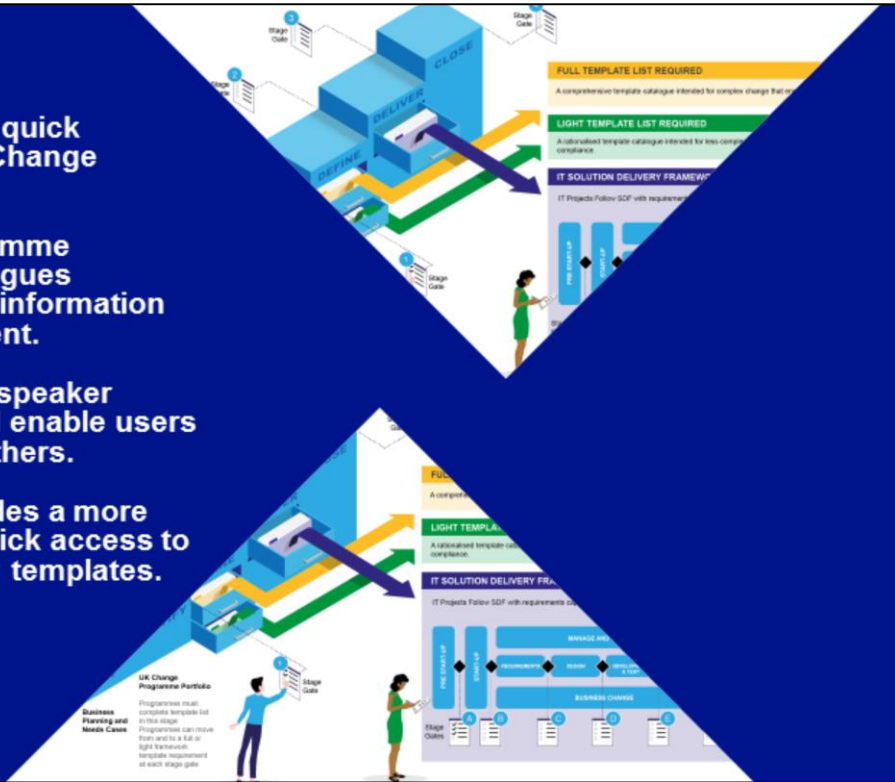
Please use this slide deck as a quick reference for guidance on the Change Delivery Framework (CDF).

It is intended to provide Programme Managers, sponsors and colleagues delivering change with the key information and useful downloadable content.

There are also comprehensive speaker notes to support the slides and enable users to present the information to others.

The CDF SharePoint site provides a more detailed overview as well as quick access to the Full and Light methodology templates.

UK Change 2020
nationalgrid

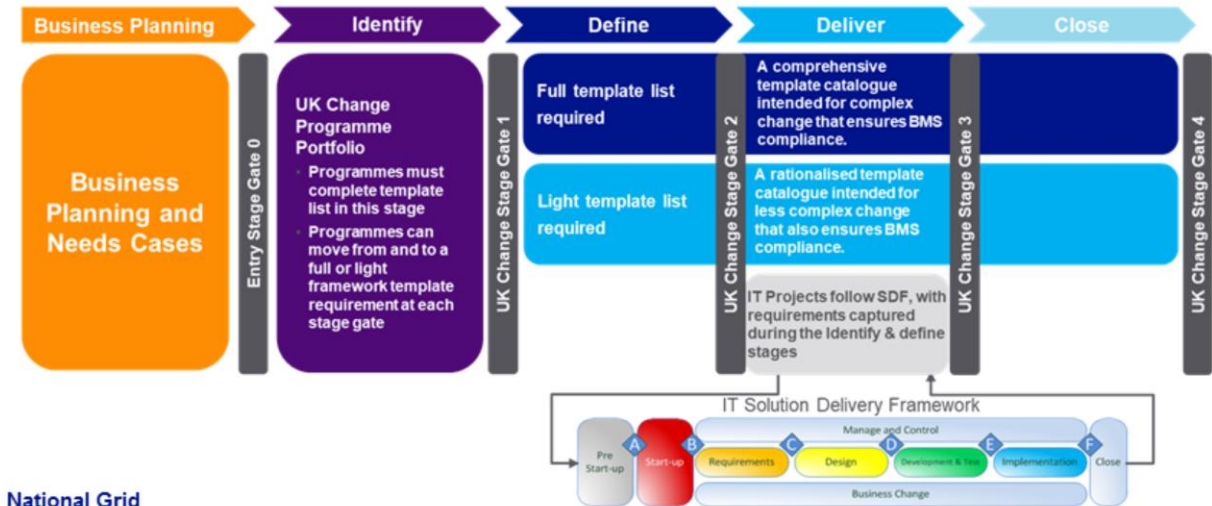


The Change Delivery Framework provides a flexible methodology that provides a single, simple set of best practice tools and processes to ensure our programmes deliver the maximum business value in the most effective way. Use of this toolset is also a great way of ensuring compliance with the BMS standard for programme and project management.

The benefits of the CDF will be realized by all programmes (Tier 1-3) embedding it within our processes therefore please work with the Change Portfolio team to make use of this framework, including feeding back what works and any potential enhancements.

Change Delivery Framework

The Change Delivery Framework (CDF) is a flexible methodology with supporting templates and guidance that provide governance and structure for successful change delivery whilst mitigating the most common problems faced when delivering change to the business.



National Grid

3

- The Change Delivery Framework is a flexible methodology with supporting templates and guidance that provide governance and structure needed for successful change delivery.
- It provides either a full methodology with a comprehensive template catalogue for complex change or a light methodology with rationalised templates for less complex change. The methodology ensures compliance with the Business Management Standards (BMS).
- The Change Delivery Framework is governed and supported by 5 stage gates (0 – 4). Stage Gate 0 is the Entry Stage Gate which provides criteria to identify the most appropriate route

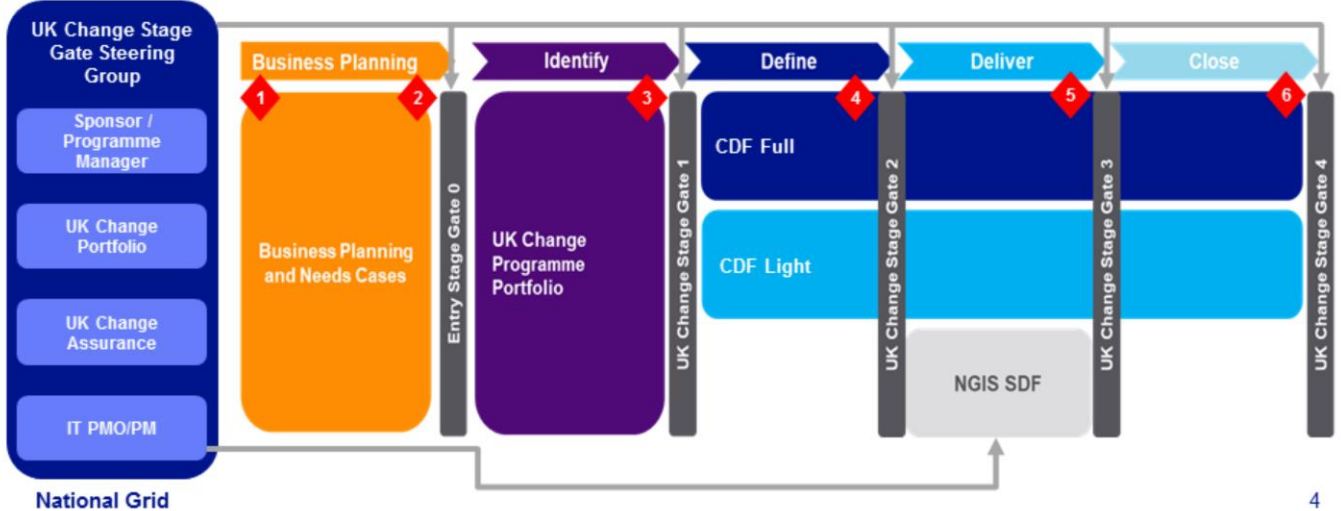
through the Framework. Stage Gates 1 - 4 provides formal agreement to proceed to the next stage of the Framework as well as oversight, assurance and quality control.

- Management of the Stage Gates will be governed by a virtual team, The Stage Gate Steering Group (SGSG), which is made up of key stakeholders and led by UK Change.
- The IT Solution Delivery Frameworks (SDF) for projects will operate within the Delivery Stage of the Change Delivery Framework and IT PMs, Business partners and PMO teams will agree with the SGSG the SDF requirements and ensure they align with Stage Gates 2 and 3 of the CDF.
- The methodology templates for both full and light are available from the Change Delivery Framework SharePoint pages

Framework and Stage Gate Steering Group

 *Denotes process steps

The Change Delivery Framework is governed and supported by 5 stage gates. Management of the Stage Gates will be governed by a virtual team, the Stage Gate Steering Group (SGSG), which is made up of key stakeholders and led by UK Change. These roles are in the speaker notes.



- The SGSG will be brought together by the Programme Sponsor and/or Programme Manager. The group can meet to assess a stage gate either at the Programme PMB or as a separate meeting, which will be agreed by the quorate members.
- For Stage gate 0, there will be a need to ensure that Lessons Learned are being considered and the Programme has been approved via a needs case with the UK Exec team.
- The UK Change Head of Portfolio will oversee the stage gate process and coordinate across the portfolio. They are responsible for chairing the Stage Gate Board

- The Head of UK Change Assurance will assure the Programme is following either the CDF full or light methodology and check the completeness of each stage gate's requirements prior to the group.
- IT PMO will be included at the SGSG to review the IT requirements of the programme and support preparation of the SDF requirements. They are accountable for ensuring any IT projects adhere to SDF in delivery.
- It may be possible that a programme switch between following the full or light methodology during its life cycle and this will be governed by the SGSG at each stage gate.
- Please see slides 5 and 6 for more information on the process steps. (red diamonds)
- Flexibility within the boundaries of the full and light methodologies is allowable and should be agreed by the SGSG members.
- Each Stage Gate requires a checklist of information and supporting documents to be collated. These checklists are included within the respective template lists on the UKCF SharePoint site.

Framework and Stage Gate Process Steps 1 - 3

1 The Sponsor captures a Needs Case and agrees it with the Entity Programme Manager process. The UK Exec approve the programme and it is captured within the UK Change Portfolio.

2 The UK Change Delivery and Portfolio teams help the Sponsor structure the programme and agree based on priority, which part of the methodology is used, Full or Light. The Entry Stage Gate meeting is arranged by the Sponsor. This can be part of the monthly Programme Board if set up. The Entry Stage Gate 0 checklist is reviewed and a decision to either Progress, Progress with Actions or Pause with Actions is agreed.

3 Support will be available from the UK Change Portfolio and Delivery teams if required to manage the **Identify** stage. When ready the Stage Gate 1 meeting is arranged by the Programme Sponsor/Programme Manager. At this stage the SGSG should also define the need for IT and what the SDF governance requirements are. The Stage Gate 1 checklist is reviewed and a decision to either Progress, Progress with Actions or Pause with Actions is agreed. IT requirements should start to be scoped out from this point onwards.

Framework and Stage Gate Process Steps 4 - 6

4

During **Define** as the programme becomes more structured with clearer outcomes, the Programme Manager and Sponsor arrange for the Stage Gate 2 assessment with the SGSG either at the Programme Board or a separate meeting. Approval of Stage Gate 2 checklist allows the programme to move into the **Delivery** stage. Any IT projects are agreed at this Stage Gate and begin using the SDF.

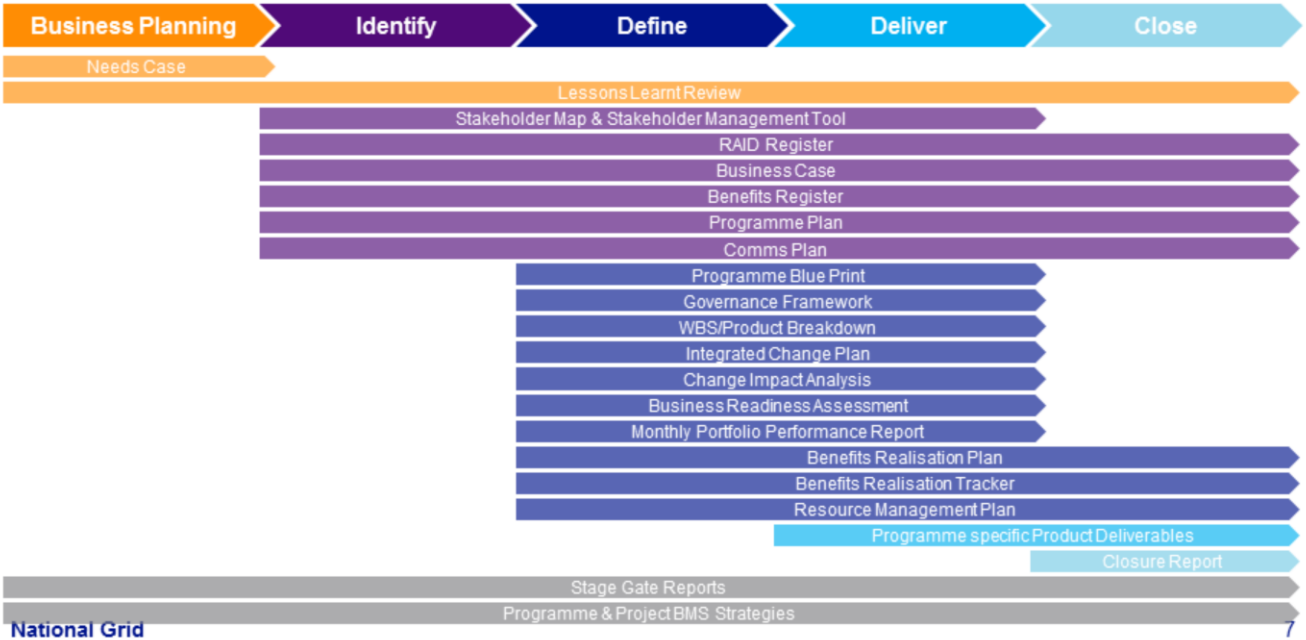
5

The programme has delivered its outcomes through a dossier of projects and prepares to enter the **Closure** stage. The programme's PMB takes on accountabilities and assessment of readiness for Stage Gates as well as alignment with the IT SDF governance model. The Sponsor and Programme manager should ensure readiness for Stage Gate 3 and arrange for the SGSG to meet.

6

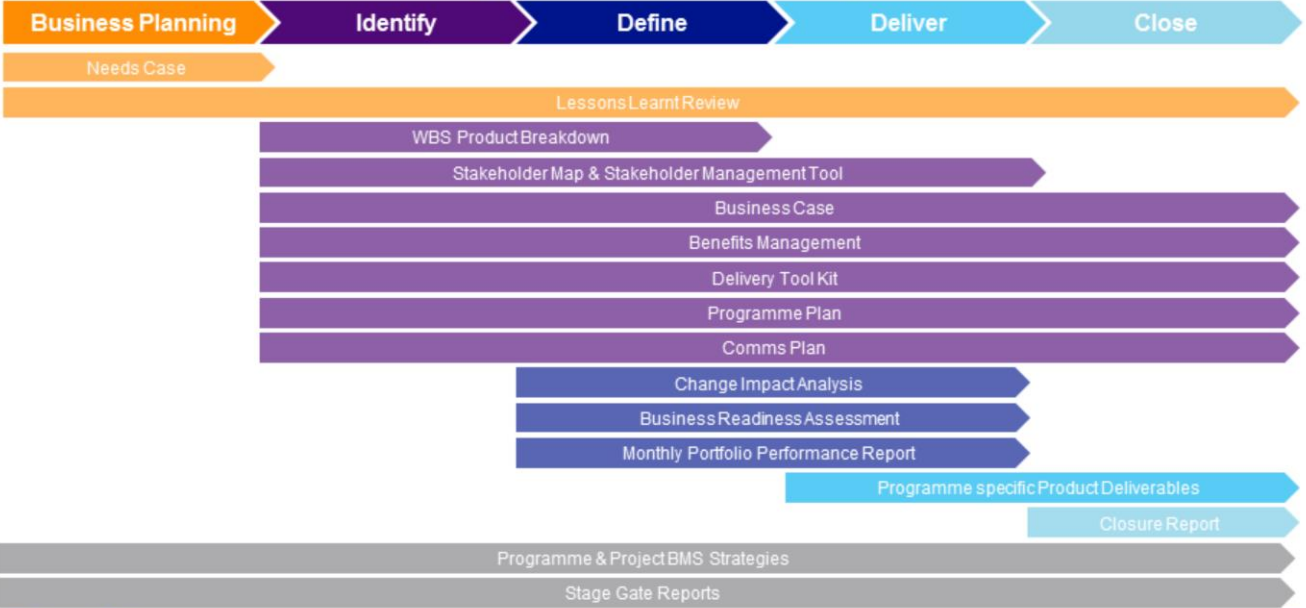
The Programme completes the necessary governance and programme steps to carry out the **Close** stage and prepare for the final Stage Gate, Stage Gate 4. The SGSG assess the Stage Gate 4 checklist and if agreed close the programme. The UK Change Portfolio manager removes the programme from the portfolio and reports this to the UK Exec. Note the final Stage Gate includes an assessment of the Benefits Realisation Plan and owners.

Full Change Delivery Framework Stage Gate Deliverables



Please use these slides to provide an overview of what information is required at each stage of the framework. This slide shows the cumulative total of all templates suggested within the full framework to support complex programmes and mitigate the most common problems these programmes will face.

Light Change Delivery Framework Stage Gate Deliverables



Please use these slides to provide an overview of what information is required at each stage of the framework. This slide shows the cumulative total of all templates suggested within the light framework to support less complex programmes and mitigate the most common problems these programmes will face.

Glossary of Terms

- **Change Delivery Framework:** A flexible methodology and supporting templates that provides appropriate governance and structure for successful change delivery.
- **Full Methodology:** A comprehensive template catalogue intended for complex change that ensures BMS (Business Management Standards) compliance.
- **Light Methodology:** A rationalised template catalogue intended for less complex change that also ensures BMS compliance.
- **Change Stage Gate 0:** The first of 5 Stage Gates providing criteria to identify the most appropriate route through the Change Delivery Framework.
- **Change Stage Gate 1 - 4: Provides formally agreement to proceed to the next stage of the framework** provides a structure for oversight, assurance and quality control at the end of each stage within the framework.
- **UK Change Framework Guidance:** Guidance for users of the change framework to aid navigation through the methodology and track progress.
- **Stage Gate Steering Group:** The governing body for programme progression through the stage gates within the framework providing oversight, assurance and quality control.

The framework includes a lot of specific terminology. To ensure clarity when using the framework and associated tools & templates, we have included a glossary of terms of the most common parts of the framework

Useful Links

- [CDF Overview](https://nationalgridplc.sharepoint.com/sites/GRP-INT-UK-UKChangeDeliveryFrameworkLite/SitePages/Change%20Framework%20Model.aspx)
<https://nationalgridplc.sharepoint.com/sites/GRP-INT-UK-UKChangeDeliveryFrameworkLite/SitePages/Change%20Framework%20Model.aspx>
- [CDF Governance](https://nationalgridplc.sharepoint.com/sites/GRP-INT-UK-UKChangeDeliveryFrameworkLite/SitePages/FrameworkGovernance.aspx)
<https://nationalgridplc.sharepoint.com/sites/GRP-INT-UK-UKChangeDeliveryFrameworkLite/SitePages/FrameworkGovernance.aspx>
- [CDF Templates](https://nationalgridplc.sharepoint.com/sites/GRP-INT-UK-UKChangeDeliveryFrameworkLite/SitePages/FrameworkDocuments.aspx)
<https://nationalgridplc.sharepoint.com/sites/GRP-INT-UK-UKChangeDeliveryFrameworkLite/SitePages/FrameworkDocuments.aspx>
- [Solution Delivery Framework](https://teams.nationalgrid.com/sites/SDP2/Pages/sdf-framework-navigator.aspx)
<https://teams.nationalgrid.com/sites/SDP2/Pages/sdf-framework-navigator.aspx>
- [Lessons Learnt Repository](https://nationalgridplc.sharepoint.com/sites/GRP-INT-UK-ChangeDeliveryFrameworkEvolutionProgramme/_layouts/15/Doc.aspx?sourcedoc=%7bFF44A71D-7675-4095-AB04-9A4B063C7802%7d&file=Lessons%20Learnt%20Repository.xlsx&action=default&mobileredirect=true&cid=91130135-4386-431c-afee-392a0fa573ee)
https://nationalgridplc.sharepoint.com/sites/GRP-INT-UK-ChangeDeliveryFrameworkEvolutionProgramme/_layouts/15/Doc.aspx?sourcedoc=%7bFF44A71D-7675-4095-AB04-9A4B063C7802%7d&file=Lessons%20Learnt%20Repository.xlsx&action=default&mobileredirect=true&cid=91130135-4386-431c-afee-392a0fa573ee

We hope this guide has been helpful to you.

Please copy and paste the URL's provided on this page to gain access to the content provided.

These links will work once we have opened up access to the new CDF SharePoint Site.