



Executive Advisory Body

Date of Meeting	Tuesday 5 th March 2019
Subject	Lessons Learned: BSG reflection
Agenda No.	6
Paper No.	4.2
Prepared By	[REDACTED - 38(1)(b) (Personal data relating to a third party)]
Purpose	Discuss

1. Background

- 1.1. The Executive Advisory Body is invited to consider and discuss Social Security Scotland's ("the Agency's") key reflections and lessons learned to date following the recent launch of Best Start Grant. This paper also signposts our recommendations to strengthen our processes for gathering lessons for continued and on-going learning.

2. Key Points

- 2.1. The document sets out the approach taken to identifying, agreeing, escalation and responding to lessons learned providing:
 - A brief overview of the activities and findings to date, and
 - Recommendations to strengthen future activity.

3. Conclusions

- 3.1. The Executive Advisory Body is invited to consider the attached document and to indicate if it is content with our findings and future plans or if it wishes the recommendations contained within to be changed or adapted in any way. This paper has been reviewed by the Senior Leadership team.



4. GOVERNANCE CHECKLIST

Strategic Objective	Contribution
Dignity, fairness and respect Delivering a service with dignity, fairness and respect at its core.	
Equality and tackling poverty Promoting equality and tackling poverty.	
Efficiency and alignment Ensuring efficiency and aligning our activities with wider public sector for the benefit of the people we serve.	This paper contributes to the strategic objective, “ we will continuously improve our services ”. It supports the upskilling of Agency staff to identify, highlight and engage stakeholders in recognising strengths and improvement opportunities through reflection and lesson learning. It also sets out how we will monitor the effectiveness of change activity arising from lesson learned to ensure that we our commitments with the Social Security Act to strive to continually improve our services for our clients and staff.
Economy, society and environment Contributing to our economy, society and protection of our environment.	

Strategic consideration	Impact
Environment	The strategy does not have any environmental implications beyond any specific reflections which will be identified within Lesson Learned activities
Governance	This paper is intended as a discussion document of high level lessons to date and to secure agreement to the development of a robust strategy, framework and plan for future lessons learned activity.
Data	The paper does not have any data implications beyond those identified by Lessons Learned activity conducted to date.
Finance	The paper does not have any financial implications beyond the use of agency resource to conduct and participate in future reflection activity and to develop our internal processes.
Staff	The strategy has implications for staff awareness which will be managed, at least initially, within Governance and Strategy Unit and for staff participation in future activity.
Equalities	The strategy does not have any equalities implications
Estates	The strategy does not have any implications for the Agency estate.
Communications and Presentation	A communications plan, to explain and support the communication of our approach to Lessons learned and subsequent Lessons learned and resultant continuous improvement activity will be developed in due course and upon agreement to these proposals.



1. Introduction

1.1 This paper seeks approval to implement recommendations to develop a robust strategy and supporting structures in place to improve our lessons learned process.

1.2 The value of undertaking lessons learned is clear and has been accepted in all areas of the Agency/Programme. This paper sets out the key strengths and opportunities which our reflections to date have identified.

1.3 While we are continuing to gather insights and lessons learned and to build structures to ensure that these can be easily accessed, understood and disseminated, this paper also provides a summary of key learning and future proposals to strengthen the effectiveness of our lessons learned activity.

2. Best Start Grant Reflection and Learning Lessons

2.1 Best Start Grant (BSG) was our first application based benefit and was launched on 10th December 2018.

2.2 This included the implementation of our new operating system (SPM) which delivered

- a comprehensive range of new inclusive channels for our clients to apply (clerical, telephony, online application);
- the system for the processing and paying of applications;
- automated and advisor led process for out-going mail;
- new processes and policies to meet client needs for example clients with existing appointee.

2.3 In the development of these systems and processes the Agency collaborated with our colleagues across the Programme and Community Analysis Division to develop our service requirements, using an Agile approach.

2.4 As a new growing and evolving Agency it is expected that with each new benefit released or activity there will be significant learning. There is also a keen appetite and openness from all interested parties to reflect, evaluate and learn from this experience. Collaboration with our colleagues in Programme and Community Analysis Division on lesson learned activity continues.

2.5 It is vital that we build the confidence of our clients, stakeholders and partners that we are reviewing and reflecting on our activities and learning from our experiences, both positive and negative. And that our partners and stakeholders have a clear insight into the value of their support and activities and how these can be strengthened to aid our service delivery.



2.6. The proximity of the launch of future benefits such as Best Start Grant Nursery Payments- [REDACTED - s.27(1) (Information intended for future publication)] and Best Start Grant School Payments- Go Live (Jun 19) necessitated the identification and communication of Lessons learned at pace and before we had a robust strategy and supporting structures in place. This paper seeks approval to implement recommendations to avoid this in future.

2.7 The value of undertaking lessons learned has become quickly apparent. Our reflections to date have identified a number of key strengths and opportunities.

2.8 While we are continuing to gather insights and lessons learned and to build structures to ensure that these can be easily accessed, understood and disseminated a summary of key learning is shown below.

3. Opportunities

- **Timing** – given the scale of deliver activity associated with the launch of BSG, the proximity to launch date of the release of products, processes and systems generated concern over the ability of the agency to test, review and refine. For example, this meant Learning and Development colleagues were placed under additional pressure to develop supporting material and upskill client advisors within very tight time parameters.
- **Testing**- the release of products in close proximity to Go Live meant that testing was constrained. A key future need is to release products at the earliest possible opportunity and that there must be an in-built window of opportunity to test the end to end process and to fully test the system and any subsequent enhancements.
- **Transparency**- Concern has been expressed that within the agency the communication of increased risk and project slippage was not as robust as it could be and that, in some instances, concern was being fuelled by informal communication channels. The current strengthening of our risk processes and development of robust release management processes should reduce this moving forward.
- **Guidance**- while recognising the value of an Agile approach and previously acknowledged time constraints, we have identified that the guidance products could have been clearer and more concise. This lesson and the impact on agency client advisors has been acknowledged and accepted by Programme colleagues.
- **Change Processes**- as expected with our Agile approach to delivery, there were opportunities to enhance and streamline processes identified following Go Live. However, the absence of robust change control mechanisms



hindered the implementation of change activity. This lesson has been acknowledged by both the programme and the agency. Governance and Strategy are currently working closely with programme colleagues to develop the mechanisms and processes to ensure we can respond to change requirements more effectively.

- **System Performance-** Early live system performance and stability significantly impacted delivery and necessitated invocation of a number of contingencies and workarounds.
- **Management Information (MI)-** MI reporting for go live was limited in scope. This made forecasting and planning challenging given the exceptional intake of applications.

4. Key strengths

- **Collaboration-** The response across the agency to the exceptional intake of applications was exemplary. The clear sense of agency purpose and a strong ethic of providing a positive service delivery experience to clients instilled in all staff meant that agency colleagues responded to redeploy resource and reprioritise to ensure we expedited claims at the earliest opportunity. Our people and managers rose to the challenges presented during the recent launch.
- **Leadership-** despite the early challenges our client advisors and staff have been very positive regarding leadership style, support and visibility.
- **Operational managers-** feedback from client advisors has acknowledged that the support they received from operational managers throughout has been exemplary and appreciated.
- **Client experience-** feedback from clients has remained predominately positive since launch.
- **Model Office-** the support from Model Office to test products, processes and systems has been recognised as pivotal to the success. The collaboration and partnership with Model Office staff is seen as an exemplar of how we should work with colleagues and delivery partners.
- **Learning and development-** despite the release of products in close proximity to Go Live date, our Learning and Development staff responded positively ensuring staff received a comprehensive and positive learning experience. Their calm and steady approach helped build confidence within our client

advisors and helped ensure and reassure staff understood their views and suggestions on improvements would be welcomed.

5. Recommendations and next steps

5.1 While we have gathered significant insight and lessons learned from our recent activity, there is still much we can do to build upon the work to date and to strengthen our approach.

5.2 Such was the appetite to understand the agency experience that in many instances it often felt as though similar lessons were being replayed to different audience groups within the programme. Meetings were often called at short notice making preparation and attendance problematic.

5.3 And while work is on-going to address the opportunities identified to improve our future delivery, there are a number of improvements we can make to the lesson learned process which will improve participation and understanding.

Recommendations
1. Identification- We need to develop and socialise clear processes within the agency that allow the timely gathering of lessons learned, providing clear accountability and effective escalations routes.
2. Identification- This paper recommends that we take a more proactive approach to lessons learned ensuring that this is staged and planned into project and operational activity to ensure that we can have the correct representation, participation and collaboration.
3. Documentation- This paper recommends the creation of a suite of standard lessons learned templates that can be used to aid identification and capture with a standard log to aid storage and retrieval of lessons learned.
4. Analyse- this paper recommends that we conduct further analysis into the effectiveness of our reflection and lessons learned processes to ensure that we do not replicate poor experience and can share, recognise and celebrate good practice.
5. Response- this paper recommends that we build stronger feedback loops to build confidence that learning has been heard and taken on board ensuring tracking and monitoring is in place to identify and challenge gaps. And that we utilise existing communication channels to highlight progress.
6. Storage and retrieval- this paper recommends that have a single easy to access route for interested parties to access lessons learned and the resultant activity. And that we look for innovative ways to ensure that the impact of our learning can be clearly expressed and understood through the use of user stories and journeys, storytelling and similar mechanisms.

The Executive Advisory Board is invited to consider and discuss these recommendations and provide their insights and any further recommendations.