

North Wales Regional Growth Vision Enabler (NWGVE) Project Evaluation –

Phase 3 Final Report

05/10/2023
Version: 0.4





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1 INTRODUCTION

Background to the Project

- 1.1 Ambition North Wales (ANW) – formerly the North Wales Economic Ambition Board (NWEAB) – is a partnership of the six Local Authorities in North Wales, as well as Bangor University, Wrexham University, Coleg Cambria and Grŵp Llandrillo Menai. The private sector has also supported the partnership through the North Wales Mersey Dee Business Council and the Business Delivery Board.
- 1.2 Via delivery of Growth Deal projects, Ambition North Wales’s ambition is to facilitate clean growth, supporting an uplift in GVA and the creation of a significant number of new jobs through investing over £1bn in the local economy with £240 million of the investment coming from Welsh Government and UK Government through the North Wales Growth Deal.
- 1.3 A Portfolio Management Office (PMO or ‘the Operation’) has been established to deliver the Growth Deal on behalf of Ambition North Wales. The PMO is part funded by the European Social Fund (ESF) – Priority Axis 5 Public Services Reform and Regional Working. The ESF funds are managed by the Welsh European Funding Office (WEFO) via the Welsh Government. The ESF project runs from April 2019 - June 2023. (Note: an operational Logic Model has been included as Appendix I, with relevant commentary made throughout this report).
- 1.4 The Growth Deal aims to deliver projects under five key programmes, namely:
 - Low Carbon Energy
 - Digital Connectivity
 - Innovation in High Value Manufacturing
 - Land & Property
 - Agri-food & Tourism

Evaluation Process

- 1.5 In August 2022, The Innovation Partnership Ltd (TIP or ‘the Consultants’) was successful with its tender to undertake Assessment of the ESF-Funded North



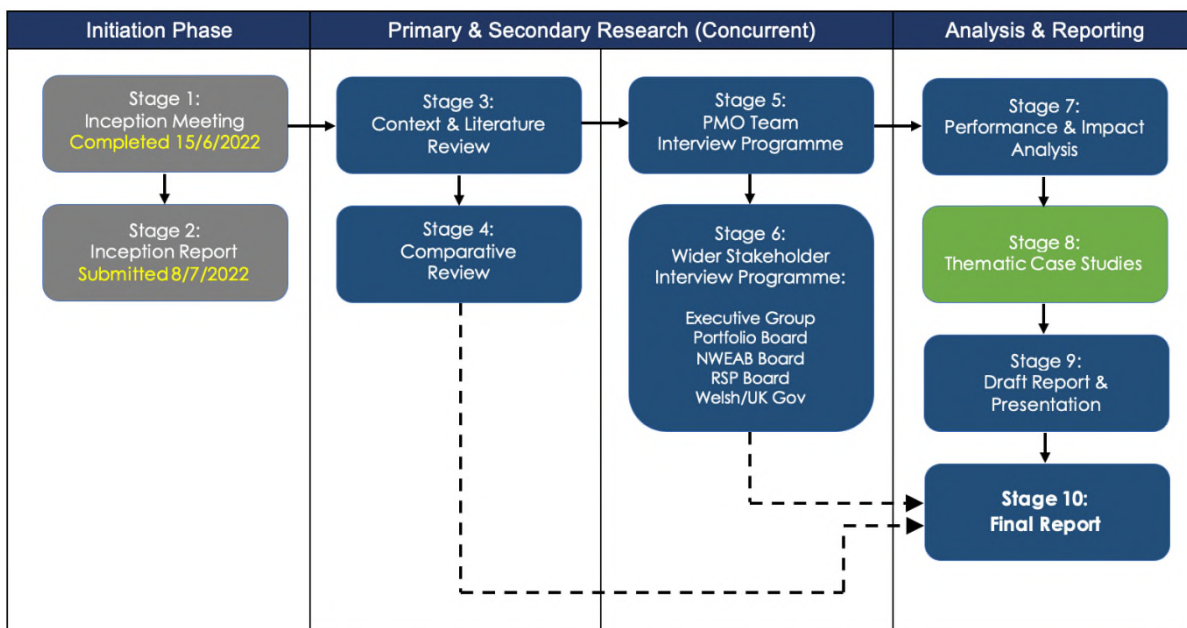
Wales Regional Growth Vision Enabler (NWGVE) Project. The Assessment consisted of three primary Phases:

- Phase 1: Inception Report
- Phase 2: Mid-Term Evaluation Report
- Phase 3: Final Evaluation Report

1.6 Figure 1 outlines the staged methodology employed for the evaluation phases, as agreed at the inception meeting of Phase 1. A blended approach of primary and secondary research facilitated robust triangulation of information and evidenced the causal relationship between intervention and impact.

1.7 The evaluation process adhered to GDPR/Cyber Essentials regulations and followed evaluation guidance set by WEFO and all Government advice in relation to ESIF funding and the impact of Covid-19.

Figure 1: Evaluation Methodology



Key:

- Phase 1 only
- All phases
- Phase 3 only

1.8 It is pertinent at this juncture to note that the above methodology encompassed agreed changes from the methodology as proposed in the Consultant's initial proposal, namely:



- 1.8.1 The original Stage 2: '*Scoping Interviews*' was removed. It was agreed that key evaluation personnel in terms of steering the evaluation were present at the inception meeting and, as primary internal and external stakeholders would be interviewed in-depth during Stages 5 and 6 of the evaluation process, in order to minimise the time requirements on such individuals and to avoid 'survey fatigue', scoping interviews were not required at this stage.
 - 1.8.2 It was agreed that Stage 4: '*Comparative Review*' should be brought forward from Phase 3 of the evaluation to Phase 2 in order to strengthen the evidence base on which to assess distance travelled against the base line position and to put the evaluation exercise on a firmer footing.
 - 1.8.3 It was felt that a survey of project beneficiaries would not add significant value to the exercise, as the nature of the evaluation is around regional collaboration and the main beneficiaries of that would be included in the stakeholder interviews. To this end, resource was reallocated to facilitate an increased number of interviews and a 'deeper dive' during the stakeholder personal interview programme in Phase 2 (Stages 5 and 6). All changes were agreed by the ESG at inception meeting stage.
 - 1.8.4 For Phase 3, due to the relatively short amount of time between submission of the Phase 2 report and undertaking the final evaluation exercise, it was felt that a select number of personal interviews encompassing Programme Managers and the PMO Head of Operations would be most appropriate. A list of stakeholder consultees has been provided as Appendix II, with the GDPR-compliant Topic Guides used to direct discussions (pre-agreed with the PMO Team and WEFO, provided as Appendix III).
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- 1.9 The Phase 1 Inception Report, confirming the methodology and reporting procedures, and identifying stakeholder groups for interview, was completed and submitted to Ambition North Wales in August 2022.
 - 1.10 The Phase 2 mid-term evaluation sought to ascertain progress and performance against the pre-intervention baseline and provide an evidence base for demonstrating distance travelled, establishing a basis for comparing the situation before and after intervention. Inferences as to the effectiveness of



the PMO and its ability to achieve its goals, and recommendations for future activities were provided. The Mid-Term Evaluation Report (Phase 2) was submitted to Ambition North Wales and WEFO and signed off in February 2023.

- 1.11 Following completion and sign-off of Phase 2, the Consultants met with members of the PMO team to agree specific activities for Phase 3, as outlined below:

Presentation of Phase 2 Results

It was agreed that the Consultants would deliver two presentations, :

- The PMO Team – the Consultants delivered a PowerPoint presentation to the PMO Team and Programme Managers on 13 February 2023 outlining the key findings from the mid-term evaluation (Phase 2) exercise. Time was allocated to allow feedback and to discuss/identify areas to be included in the proposed Action Plan.
- Wider Stakeholders – At the time of completing this Phase 3 report, the presentation to the wider stakeholder group was still to take place. Attendees to be decided by Ambition North Wales but likely to include members of the regional partnership (local authorities, universities and colleges), leads of the respective Boards and wider stakeholders interviewed during Phase 2.

Follow-up Interviews and Development of an Action Plan

- Follow-up research questions to be addressed in this Phase 3 report were agreed between the Consultants, the PMO team and WEFO (topic guides included as Appendix III). An interview programme with PMO Programme Managers and the PMO Head of Operations (Appendix II) was undertaken, with analysis of information obtained during the interview process provided in Section 2 of this report.
- Linking directly to the key observations and recommendations detailed in the Phase 2 mid-term evaluation report, the Consultants worked alongside members of the PMO Team to develop an Action Plan for ongoing PMO activities. Observations/recommendations to be actioned were identified, with associated activities outlined and prioritised (High Priority/Immediate Start through to Low Priority/Long-Term). The Action Plan is provided in Section 3 of this report.

Production of Case Studies



It was agreed that the Consultants will provide three case studies to showcase the additionality brought about as a result of PMO operations to this point, illuminating the impact of PMO activities and bringing the evaluation to life. Case studies were informed through follow-up telephone interviews or visits with willing participants (PMO Team, Project Sponsors if relevant) and a review of relevant desk material. Each case study was professionally prepared with images and graphics (including all relevant logos), to be used either as standalone documents or included in annual reports etc. Case studies have been provided as Appendix IV of this report.

Follow-up Meeting with Cardiff City Region

Completion of the comparative review aspect in Phase 2 identified that enhanced communications between the PMO and Cardiff City Region Teams would be beneficial and, to this end, an official meeting was to be facilitated by the Consultants as part of Phase 3. When the time came to progress such activities, it was agreed between all parties that communications between the PMO and Cardiff Teams were now regular and ongoing, negating the need for an official 'follow-up' meeting as part of Phase 3.



2 INTERVIEW PROGRAMME ANALYSIS

- 2.1 For the purposes of this Phase 3 exercise, the Consultants held personal interviews with four members of the PMO Programme manager group, and a follow-up interview with the PMO Head of Operations.
- 2.2 The key findings from the interviews have been provided below under the following themes:
- Current Project Status
 - PMO Activities
 - Cross Cutting Themes
 - Action Plan/Future Activities

Current Project Status

- 2.3 It was acknowledged by all Programme Managers that there have been delays to this point, with only one project, the Digital Signal Processing Centre, Bangor University, getting to delivery stage at the time of completing this exercise.

It is pertinent to identify that Programme Managers believed that those projects for which the Ambition North Wales “holds the reigns” are on track, with, for example, a hydrogen project being undertaken under the Low Carbon Energy programme moving forward through the business case process as agreed with the Board. Digital Connectivity (under which the DSP Centre at Bangor is being delivered), has three other projects being led by Ambition North Wales, with one going for final approval shortly. The decision was taken to run two of the three projects side-by-side as both are dependent on new digital infrastructure.

“It just made good sense to do that and we can take those decisions when the projects are managed by Ambition North Wales.”

- 2.4 Programme Managers identified that those projects that are capital-build, site-specific projects have often been impacted by what could be termed “typical” delays – consent issues, match-funding issues, cost-related issues, with inflationary pressures in particular having a significant impact on project delivery over recent times.



When pressed to identify what could be done to mitigate such issues, Programme Managers commented that timelines, particularly in those projects that involve a capital build, are influenced by two primary issues:

- Projects have, at times, set unrealistic timescales, which it could be argued is a result of funders putting pressure on sponsors to show that they can deliver. Things then get delayed and pressure is felt from politicians/government, compounding the issue.
- It was identified that the challenge with scheduling is that projects applications are examined 18 months in advance and a lot can change. It is difficult to factor in unforeseen issues that regularly influence big capital projects. It was commented that there is a degree of recognising that it is extremely challenging to schedule capital projects and extremely challenging to deliver with no delays. Timelines are put together by the projects so ultimately funders are reliant on the projects coming up with sensible schedules that have had expert input when being determined.

“When we started on the Growth Deal journey, a lot of these projects were at very early stages. We set out timelines for 20 projects, the vast majority of which were years away from the start of construction. So, from the word go we possibly made a rod for our own back and we’ve been playing catch-up ever since. Combined with the macro-economic factors over the last few years, it has been a very challenging landscape in which to deliver projects.”

Programme Managers also identified that delays have been caused by, for example, reviews by Welsh Government, but that projects are now moving forward and the focus is on picking up time where possible.

2.5 Overall, Programme Managers recognised limited progress to this point but were confident that momentum is building. Examples from within specific programmes include:

- Low Carbon Energy currently has two OBCs (Outline Business Cases) being brought forward for partner-led projects and the two projects on which Ambition North Wales is leading have key milestones coming up, one being establishing a competitive process to bring a partner on board (hydrogen project), planned for June 2023.



- Land and Property project ‘Former North Wales Hospital in Denbigh’, a Local Authority-owned project had issues and required an extra £3m of funding to “fill the gap”. The team are now expecting an OBC by the end of summer 2023, and a possible FBC (full business case) by the end of the year, with demolition work on site beginning in early 2024. ‘Holyhead Gateway’ is also progressing, with an OBC expected in late Autumn 2023, and FBC early 2024.

PMO Activities

Logic Model

- 2.6 When asked about the Logic Model, the consensus was that the model is, for the most part, still relevant in that it is well-structured and remains useful in setting out the roles, accountability, and reporting functions in a robust way. There was acknowledgement that, moving forward, adaptability may now be more important than fixed processes and that the PMO must be responsive to project requirements as the Growth Deal moves into a delivery phase where more flexibility is needed.
- 2.7 Many external stakeholders revisited the Logic Model for the purposes of the Phase 2 evaluation, with the majority commenting that it remains fit-for-purpose and relevant. There was recognition that increased flexibility within the model will be advantageous as the Operation focuses on project delivery. In terms of its relevance for the achievement of indicator outputs and long-term objectives. Interviewees commented that the Operation is generally on track to deliver everything that was set out in the Growth Vision Business Case and captured in the Logic Model, but recognised there was a delay of approximately 12 months. During Phase 2, one stakeholder commented that:
- “The Logic Model provides a focal point for what we do. We have now developed good relationships with the Welsh Government and the Welsh Office, who directly input into central government. What we are doing now is demonstrating clear leadership on a lot of the Growth Deal activities. We have established a real Centre of Excellence in terms of better business case*



development and we have a collective team of specialists, with greater experience and ability.”

Performance Against Indicator Targets

Table 1: Progress Against Funding Indicator Targets

Output Indicator	WWV 82265	EW 82266	Claimed	Suggested Output	Evidence	Target
Number of projects targeting public administrations or public services at national, regional, or local level	1	1	April 21	NWGV 82265 NWGV 82266	WEFO Offer letter 82265 WEFO Offer letter 82266	Achieved
Number of methods, processes and tools being developed with support	2	2	July 22 Oct 22 Jan 23 Jan 23	Project Management Framework Economic Recovery Prospectus Benefits Realisation Carbon Biodiversity Methodology	PMF Manual, meetings, workplans, emails Prospectus - minutes, surveys, workshops Benefits Realisation plan - PAR recommendations, strategy, software, implementation, presentations. Methodology - Position statement, meetings, consultants	Over achieved. Output target of 2 - claimed 4
Number of entities participating in projects targeting public administrations or public services at national, regional, or local level	4	3	April 21	Partnership Agreement	Governance Agreement 2 (GA 2) Signed by Local Authorities	Achieved
Result Indicator	WWV 82265	EW 82266	Claimed	Suggested Output	Evidence	Target
Number of new methods, procedures, and tools developed and disseminated	1	1	Jan 23	Benefits Realisation Carbon Biodiversity Methodology	Benefits Realisation plan - PAR recommendations, strategy, software, implementation, presentations. Methodology - Launch, learning events, presentations, articles, training plan.	Over achieved. Result target of 1 - claimed 2

2.8 Since progress against targets was discussed in the Phase 2 mid-term report, it can be seen that both the Project Management Framework and the Economic Recovery Prospectus were signed-off in 2022 (July and October respectively), with the Benefits Realisation indicator being claimed in December 2022 and the Carbon Biodiversity Methodology receiving RME approval on 25 January 2023 (both outputs claimed in the January 2023 quarterly submission to WEFO).

2.9 Performance against indicator targets has been an area of strength for the Operation, with all indicator targets being achieved or, indeed, exceeded. Discussions with the PMO Team regarding the two most recently signed-off tools, i.e. Benefits Realisation and Carbon Biodiversity Methodology, identify that both tools are being used. The benefits realisation software is now being used to report on project benefits. Each Programme has a benefits plan and logic model and all projects that sit within a programme are required to align to the relevant Benefits Realisation plan. The Carbon Biodiversity Methodology



will be applied to all of the Growth Deal projects. In order to gain a shared understanding across the region, a supported learning programme has been set up and offered to all partner organisations. The learning is focusing on completing the assessments for selected current Growth Deal projects. The PMO Team acknowledges that the second part of such training has been delayed to ensure the projects are at the right stage to undertake the assessments. This activity is now due to take place on 18 October 2023, with 20 participants taking part in the training. Additional funding has also been secured to do a second cohort which will likely take place later this year/early 2024.

Best Practice

- 2.10 When asked to identify best practice/added value provided by the PMO Team, stakeholders, including Programme Managers, were able to highlight specific areas in which they believed best practice had been developed but also recognised that a lot of such work probably goes on “behind the scenes” and should be promoted more.

“What stakeholders need to accept, and it is probably our fault for not letting them know, is that we do more than what the common perception is. We need to identify and promote consequential benefits. We need to be seen as a resource for other communal activities across North Wales.”

It was also proposed that some of the best practice developed has been done so through trial and error, with processes being refined out of learnt knowledge. For example, it was commented that:

“From 2019-2020, we spent a lot of time in a state of flux and did not have the knowledge to produce sharp decision-making. This has changed.”

- 2.11 Stakeholders believed that the tools/methodologies developed by the PMO team, with the possible exception of the Recovery Prospectus, remain highly relevant, with several representing best practice. It was commented that the full value of such tools will only be observed once the methodologies are embedded and utilised, which will be when the delivery stage intensifies.



“We are bringing on board potentially four new projects, most of which have not gone through the OBC process yet and this is where the methodologies will come into play.”

- 2.12 The majority of interviewees identified the ‘Benefits Realisation’ and the ‘Carbon Emissions and Biodiversity’ work undertaken by the PMO Team to be an area of best practice, with the work *“needing to be recognised”*.

One interviewee believed the Carbon Emissions and Biodiversity Methodology to be a very ambitious document, but *“possibly the best in the UK, certainly best practice”*. The document was seen as critical to driving Net Zero requirements, particularly in any projects that encompass construction of buildings.

It was asserted that such work has been identified as exemplar by the two governments and that it is important to highlight that the work has assisted other PMOs and Growth Deals.

“There is a risk that benefits realisation is an afterthought. I would be surprised if any other Growth Deal has done as much work on benefits realisation as us. The work that has been done is next level – certainly an area of best practice.”

“Such methodologies add value to the business cases and ensure that Well-being of Future Generations (Wales) Act (WFGA) and Net Zero targets are accommodated.”

It should be noted that one interviewee believed the Benefits Realisation work to be a substantial part of the setup, but could possibly benefit from being more agile, possibly lighter touch.

- 2.13 The Project Management Framework is viewed as robust and comprehensive, a tool that is used internally and with the projects. One Programme Manager commented that he believed other PMOs view the Framework as close to best practice. One Programme Manager did believe that the Framework could include a stronger risk evaluation element, which aligns with views put forward by wider stakeholders in the Phase 2 evaluation report.



2.14 As identified in the Phase 2 report, the Recovery Prospectus was viewed by all stakeholders as ‘of its time’ but highly relevant at that time. The Recovery Prospectus may have been superseded by new economic challenges, but it was highly relevant in its time.

Consequential or ‘Unintended’ Benefits

2.15 Over and above the methodologies developed by the PMO team, interviewees believed the added value provided by the team, including sector-specific examples, included:

- **Five-Case Business Model Expertise** – Programme Managers identified that the Team has built understanding in this area and can share that knowledge with the various stakeholders and government.

“This has created better know-how and practices – we have raised the bar. Within our projects, we need to take this through to economic benefits - employment, GVA and wellbeing.”

- **Facilitation of Engagement with Industry** – the example provided related to the energy sector specifically, identifying that the role of the PMO team has “regionalised” discussions on the energy sector, filling a gap in the process.

“Pre-PMO there wasn’t a regional forum to discuss/consider energy – you can’t deal with energy locally; it has to be regionally/nationally in terms of infrastructure.” It was believed that, through the structures put in place with the Programme Boards, a platform has been created for significantly more regional partner working/collaboration. It was recognised that such activity is intangible in nature and difficult to measure – bringing people together, the snowball effect etc. – but interviewees believed that such activity can be directly attributed to the work of the PMO Team and what has been done through the programmes.

- It was identified that the PMO is now **leading on significant strategic energy deliverables for the Region**, steering the Regional Energy Strategy and delivering Local Area Energy Plans for all the Local Authorities, under a project manager/coordinator role on their behalf.

“Because we set up the PMO and because we did a good job with the energy programme, Government views us as a delivery vehicle for getting



stuff done in North Wales. Therefore, the PMO has added a huge amount of value in the energy space, with significant stakeholder engagement encompassed within such activities...at a programme and a project level.”

- **Promotion of the Digital Sector** – Programme Managers believed the PMO to be *“the go-to people on digital for the whole of North Wales”*. Through the Digital programme, technology is put on the agenda for local leaders. It was commented that the Team has lifted the bar on what can be done digitally, over and above that over the Growth Deal.
- Programme Managers believed that the PMO gives stakeholders, be they businesses, other regions etc, a **“touch point”**, i.e. stakeholders know they have someone that they can contact to get a regional perspective on the relevant sectors, which can facilitate the right introductions, the right discussions. One interviewee commented that this is a significant benefit of the PMO and that:

“If you tried to quantify some of the partnerships/collaboration we have enabled simply by existing and making those introductions, you would probably find that we have leveraged more investment from such activities than we have through the Growth Deal projects. Because you can’t measure this, or broadcast it as it is often sensitive information, it gets missed. This benefit needs to be stressed – we provide an entry point for the region and things happen from there.”

- 2.16 Interviewees acknowledged there is a need to properly define the consequential benefits of PMO activities and to better promote such impact to regional stakeholders:

“What stakeholders need to accept, and it is probably our fault for not letting them know, is that we do more than what the common perception is. We need to identify and promote consequential benefits. We need to be seen as a resource for other communal activities across North Wales.”

- 2.17 The Consultants believe that there is the potential for significant consequential impact from PMO activities as a result of a widening role for the PMO in delivering at the regional level. This scenario was identified during the mid-term evaluation review and could encompass consolidated services which each of



the LAs could access, with the PMO Team being a strategic representative for the issues of the Region. The future role of the PMO could potentially be a centralised economic delivery arm for the Local Authorities, but mission creep would need to be carefully monitored.

- 2.18 When asked if they believed the PMO provides value for money (VfM), it was the view of the majority of interviewees that it has but it would possibly be difficult to justify to this point. All interviewees, however, believed that VfM will become more evident and will be significant, when a critical mass of projects enter the delivery phase.

Cross Cutting Themes and WFGA

- 2.19 When establishing how to allocate European Structural Funding, one consideration is that the interventions should seek to integrate economic, social and environmental outcomes, consistent with the Welsh Government's central organising principle of sustainable development and contributing to the outcomes of the Cross Cutting Themes (CCTs). The aim of the CCTs is to improve the quality and the legacy from each operation supported by the Structural Funds and to add value to the programmes as a whole. The CCTs require action in multiple fields and are embedded within the design and delivery of all operations. The three CCTs are:

- Sustainable Development (SD)
- Equal Opportunities, Gender Mainstreaming (EO&GM) note: the Welsh language also falls under this CCT in Wales
- Tackling Poverty and Social Exclusion (TP&SE)

- 2.20 The first two of these CCTs are mandatory under EU Regulations. Tackling Poverty and Social Exclusion has been included as an additional CCT in line with the key commitments of the Welsh Government set out within its Tackling Poverty Action Plan.

- 2.21 Specific 'case level indicators', are also assigned to the project, requiring the NWGVE project to report narratively on how it addressed such themes:



Table 2: NWGVE Case Level Indicators

Relevant CCT	Case Level Indicator
SD	<ul style="list-style-type: none">• Resource efficiency measures
EO&GM	<ul style="list-style-type: none">• Actively supporting speakers of the Welsh language
CCT General	<ul style="list-style-type: none">• Developing / engaging CCT Champions

2.22 In discussion with the CCT Champion for the PMO Team, it was confirmed that all case-level indicators had been achieved by the Phase 2 stage evaluation, and claimed by July/October 2021. The following table provides evidence against each case-level indicator:



Table 3: NWGVE Case Level Indicator Activity

CCT level indicators	Activity	Evidence	Equality Impact Assessment	Future Generations and Cross Cutting Themes Assessment	Welsh Language Impact Assessment
<p>Actively supporting speakers of the Welsh Language</p>	<ul style="list-style-type: none"> All project documentation produced bilingually No of Welsh essential posts recruited Supporting Welsh businesses & Culture Team Welsh Language awareness session. Provided opportunities to for staff. Support provided through Gwynedd to the team to encourage staff to become more proficient in Welsh. Time and support given to staff who register. Welsh buddy system. 	<ul style="list-style-type: none"> Gwynedd's Welsh Language Policy. Person Specifications of key roles Case study / Video case study Training undertaken by the team Additional to the social value achieved through procurement and producing blanglwg material, there is a high proportion of Welsh Speakers within the team. Six out of nine members of the leadership team are Welsh Speakers 	<ul style="list-style-type: none"> Yes, positively impacts the Welsh Language 	<ul style="list-style-type: none"> Contributes to a thriving Welsh Language 	<ul style="list-style-type: none"> Yes - Promotion via job applications and retaining Welsh speakers in Wales
<p>Resource efficiency measures</p>	<ul style="list-style-type: none"> Home working and continued use of virtual meetings has reduced carbon footprint through reduction in travel. This will continue where possible throughout the operation and is adopted as good working practise across the region. 	<ul style="list-style-type: none"> Provide details on the travel reduction relating to home working and virtual meetings Copy of Green Dragon award Reducing the need print, digitalisation of records. 	<ul style="list-style-type: none"> Flexible working environment and culture removes barriers for any person that is unable to travel 	<ul style="list-style-type: none"> Globally responsible 	



CCT level indicators	Activity	Evidence	Equality Impact Assessment	Future Generations and Cross Cutting Themes Assessment	Welsh Language Impact Assessment
	<ul style="list-style-type: none"> Green Dragon awarded for the office space building. Sharing of resources via Share Point creates efficiency within the region. It also supports collaboration with partners allows sharing of best practises to be disseminated and adopted reducing the need to print. 	<ul style="list-style-type: none"> Ensure it meets WEFO standards. Electronic digital signatures adopted Access to green car scheme Team challenge - Commute to work via public transport. 			
Developing / engaging CCT champions	<ul style="list-style-type: none"> Spot light session for CCT's ensure objectives are embedded front and centre for projects Eco Plan incorporate into the Team Charter: Equalities Act 2010 Future Generations act 2015 Impact Assessment: (equality, environmental assessment, Welsh language assessment) which articulates into deliverable activity. 	<ul style="list-style-type: none"> Team Charter Wellbeing: Supporting each other. Looking after your physical and mental health : Team Step Challenge, MIND fundraising. Wellbeing consultant commissioned to provide the team with valuable skills to look after themselves (self-care) Project Impact Assessment Portfolio IIA 	<ul style="list-style-type: none"> Incorporating all team members. Ensuring there is a understanding and acceptance of equality within the team and the public. Development of IIA to ensure all projects consider the impacts against Equalities 	<ul style="list-style-type: none"> Healthier Wellbeing considered at project level and monitored through delivery. 	<ul style="list-style-type: none"> Included as part of the IIA. Opportunity for the CCT Champion to host a spotlight session for the PMO team. This has been added this to the Action plan.



2.23 The Consultants acknowledge that strategic contribution to the mainstreaming of CCTs and delivery of Well-being Goals is explicitly outlined in tools/methodologies developed by the PMO, the Benefits Realisation Framework and Carbon Emissions and Biodiversity Methodology in particular:

- The Benefits Realisation Strategy (claimed January 2023) begins by identifying that, “*explicit in the aim of the Growth Deal is the ambition of inclusive growth, growth that delivers a more vibrant, sustainable and resilient economy in North Wales in line with the Wellbeing of Future Generations (Wales) Act 2015 and the Prosperity for All Economic Action Plan.*”¹ and identifying the importance of agreeing the economic, social and other impacts that may be generated as a result. The Strategy outlines Theories of Change for each Growth Deal programme, with a series of Pro Formas developed by the PMO that identify **specific theme approaches** to monitoring and evaluation in relation to identified outputs, potential impacts and positive equality actions; and a **general approach** to monitoring and evaluating **Community Benefits and Social Innovation** realisation given the cross cutting nature of both objectives and extensive variation in the benefits that could emerge. Full and thorough use of such tools by project managers/sponsors will properly record contribution to CCTs and the Goals of the WFGA.
- By its very nature, the Carbon Emissions and Biodiversity Methodology (claimed January 2023) will mainstream the Sustainable Development CCT and facilitate material contribution to the Goals of the WFGA, not least ‘A Healthier Wales’ and ‘A Globally Responsible Wales’.

The Methodology is designed to guide Growth Deal projects in North Wales to improve biodiversity and reduce operational and embodied carbon impacts from the outset of a project, through the development of the business case, and into the running of the project. Each of the Growth Deal projects are required to work towards the following targets:

- Zero operational carbon – when operational the projects will not emit more greenhouse gases than they absorb

¹ <https://gov.wales/sites/default/files/publications/2019-02/prosperity-for-all-economic-action-plan.pdf>



- 40% less embodied carbon – which will cut the carbon created when the projects are built and when they are decommissioned
- 10% net benefit for biodiversity – which means improved biodiversity than before the project.

The PMO team has worked with Arup (experts in sustainable development in the built environment) to create a methodology that gives practical, step-by-step guidance to help Growth Deal projects consider emissions and biodiversity at every stage. The Methodology works alongside the Green Book and Better Business Case approaches committed to in the Growth Deal Governing Agreement 2 (GA2). To help project teams make the assessments as they progress through the business case stages, the PMO team has devised a series of straightforward template forms – proformas – for each of the three types of assessment, each supported by guidance within the main body of the methodology:

1. Business case assessments: teams can use one-page business case proformas to show how they've considered carbon and biodiversity impacts and benefits in their strategic, economic, commercial, financial, and management cases. The questions are like checklists to guide project managers where to consider emissions and biodiversity within the project business cases.
2. Carbon assessments (CA): all infrastructure projects generate carbon emissions. These assessments help teams plan how to minimise them. The proforma templates take them from early stages (long-and-short-list stages), through to creating a baseline assessment, and then minimising emissions during procurement, design and implementation.
3. Biodiversity assessments (BA): If a project has biodiversity impacts, these assessments help teams plan how they'll mitigate them. The proforma templates start at the early stages (long-and-short-list stages), through making a biodiversity metric calculation and then minimising biodiversity impacts during procurement, design and implementation.

Red-Amber-Green (RAG) assessments are utilised early on in the assessment process, with assessment becoming more detailed as project design firms up. “If costs can be assessed then carbon can be assessed similarly.”



2.24 The Consultants are also aware that a 'Social Value Platform' which will measure achievement against social value is being developed. Through the procurement process, the PMO team will seek to address inequalities and suppliers will be required to demonstrate social value within their tender applications, allowing social value contributions to be assessed and scored. Any jobs created as part of this process will be entered into the system along with the profile of the successful applicant: age, home postcode, protected characteristics, county, Welsh language job type.

2.25 The Consultants believe the combination of the tools identified above provides a comprehensive mechanism to assist Growth Deal projects in both adhering to, and delivering against, CCT and WFGA objectives. This opinion was shared by stakeholder interviewees who commented that both strategies are explicit about how projects should be considering and planning how they will deliver against such ambitions from the early stages.

2.26 Interviewees acknowledged that CCT delivery is not always the main priority for businesses delivering projects, so being as prescriptive as possible here is worthwhile.

"When we do our OBCs for projects, we go through all the Well-being Goals and we challenge projects to analyse how they can contribute to those. When we take business cases forward to the Board, they are accompanied by impact assessment reports that encompass WFGA goals etc."

2.27 The WFGA was recognised as potentially the most important overarching driver for a Welsh Growth Deal, needing to be considered from the top level, i.e. when the overall Growth Deal portfolio business case was put together. To this end, it was commented that strategic consideration was given to how projects would deliver, and what would be put in place to deliver, against the WFGA Goals. Cascading down from there to the project level, one of the key elements of the business case is for projects to identify how they are delivering against the Goals, so in all strategic cases there will be an explanation of what the project



is doing in this area. You then have the impact assessments which have explicit sections on WFGA Goals.

“I have to point out the sustainability agenda is something that is novel. It will be difficult to start with, but there is no more willingness and understanding of delivery. This is the way things need to be done in the future, so it needs to be adopted.”

- 2.28 Programme Managers recognised that, as with other areas of the PMO Team’s role, significant evidence of contribution to CCT and the goals of the WFGA will be seen when projects reach the delivery phase and, as such, they were unable to provide significant evidence of CCT delivery to this point:

“Across all categories, until project delivery, we cannot claim any of this (contribution to WFGA goals) or any net consequential benefits. As projects unfold, there will be tangible benefits, which will be recorded and promoted.”

- 2.29 Some anecdotal examples of contribution to specific WFGA goals were provided, i.e. work around telemedicine and ensuring GP practices work in secure networks (**A Healthier Wales**), and *“We set out to design and construct quality networks, which add to resilience.”* (**A Resilient Wales**).

It was recognised that projects in, for example, the Low Carbon Energy Programme, have the potential to deliver against the majority of WFGA goals and it was recognised that monitoring and recording of such evidence will be a critical activity when applicable.

- 2.30 Programme-specific challenges were identified by Programme Managers, for example, one of the things that has been challenging for the energy programme is that there are a lot of stakeholders that see it as a decarbonisation programme, whereas it is an economic growth programme that focuses on decarbonisation of the energy system.

“This has been an interesting dynamic to work through because what we’ve had to do at times is explain that we’re not here to deliver decarbonisation projects that don’t also have a significant economic benefit. The KPIs are around



investment and jobs and we are delivering projects in tidal, hydrogen etc that deliver jobs, whereas solar farms that deliver carbon reductions but little economic benefit are not applicable.”

2.31 It was identified by interviewees that more can always be done in this area. Within the Programme Manager cohort interviewed for the purposes of this evaluation, the importance of the Welsh language was frequently cited in interviews, but two interviewees could not identify who the CCT Champion was for the PMO team.

“Going forward, we need to ensure we are transformative. We also need better alignment and buy-in to both regional and national strategies. On occasions, we may be accused of losing site of the WBFGA, which is something we need to address.”

Action Plan/Future Activities

Action Plan

2.32 The Action Plan produced as a result of conclusions/recommendations made in Phase 2 of this exercise has been included in Section 3. Comments made during discussions on sections of the Plan have been accommodated in the Plan and summarised below:

- **Risk assessment** – it was acknowledged that risk is managed both by the PMO/Programme Manager team in the projects managed by Ambition North Wales, and by the project managers in those run by the Sponsors. What is required is ensuring there is space to discuss risk at the project Board level and deciding – *“are there risks here that need to be escalated to Programme Board level? Is there mitigation that we as the Growth Deal can help with?”* It was identified that, going forward, programmes will ask projects to provide a worst-case scenario schedule, which is a risk-adjusted schedule, particularly pertinent for capital build projects. If the worst then happens regarding consenting, regarding costs, such a scenario will have been planned for. *“This is a change in terms of our reporting to Government.”*
- **Streamlining the Five-Case Model** – “Over the last three years, we’ve done a lot on this, so for smaller projects BJs (more concise, for projects



less than £4m). ultimately the Treasury's Green Book Std is what we need to comply with." Programme Managers recognised that issues are being encountered as suppliers are only keeping quotes open for a matter of weeks now, so spending two or three months on a FBC is now problematic. Managers identified that work has been done on streamlining the review and approvals process, with a methodology developed that allows fast-tracking of FBC approval provided that projects don't fall outside of agreed thresholds, i.e. if you have an OBC and you have gone out to market and got quotes, provided there is no change in benefits, scope or costs within a 10% margin above or below, the FBC will be fast-tracked because the OBC has already been done in detail and essentially nothing has changed. If things change significantly during procurement, the FBC is taken through a more thorough process.

"One of the failings to date is that we have been fairly rigid in the way we have applied our processes, promoted the five-case business model and responded to local issues/concerns. We would all accept that more flexibility, given the vast range of projects and partners we seek to serve, would have benefited the PMO and lessened time delays. We have to accept we are working with real-world projects."

It was felt by some interviewees that lessons learnt are around guidance of the five-case business plan and ensuring projects are aware of the next stages and what is required from them. It was felt that a shorter time agenda could be pushed for, as long as the Team is "carrying" the beneficiaries and they understand what is required.

- **Impact of the CJC** – it was commented that the PMO is well-staffed and has a budget, which the CJC is/does not as it currently stands. Programme Managers believed that the CJC has a different agenda, but it has not gone unnoticed that examination of how the two teams can be brought together is ongoing.

"This is for the greater good of the Region. I think we can have a balanced profile. The outside world will look at a single entity."

- **Procurement** – it was identified that the PMO Team has promoted the importance procedures, which are adopted by the Programme managers and the Project Sponsors. It was recognised that one area of improvement



here could be better accommodation of the social side and consequential benefits.

Role Going Forward

2.33 In terms of the PMO Team's future role and influencing policy development, Programme Managers were keen to identify that the Growth Deal journey is still at the very early stages and delivery of projects must remain a priority for the foreseeable future.

“Let's be clear. We are only in delivery on one project. Next five years, the primary goal will be getting as many of these projects into delivery as possible. Once projects are into delivery, we've shown that the PMO can add real value supporting other strategic areas of work on behalf of the region or on behalf of individual Local Authorities, and we're already doing that in energy, in digital as well. I don't see why this won't continue to be the case.”

“Going forward, we need to be more flexible, predicting issues that projects may face, alerting them and aiding them to bring projects back on track. When I first saw the projects, I could not perceive the difficulties/delays we would encounter. Let us take that knowledge into the next round and learn/benefit from it.”

2.34 It was also commented that there is a need to encourage project stakeholders to think ahead, plan more efficiently and make changes in the environment. There are also opportunities to link projects together, seeking economies of scale where possible.

“We now have institutional intelligence, which we should go on to exploit wherever possible.”

2.35 Whilst ensuring that focus remains on project delivery within the short- to medium-term, interviewees did acknowledge that, resource permitting, there is the potential for the PMO to provide significant input/influence into policy/strategy, and that this would be highly beneficial for the Region.

“All the consultations that come through on policy and big strategic projects, we don't have the time to provide input. If we had a bit more resource to do this, to



have regional influence here would be incredible. I think there will be more capacity to do this when the projects are in the delivery phase. This would need the buy-in of the partnership obviously because we are speaking on behalf of 10 organisations.”



3 ACTION PLAN



WEFO EVALUATION FINAL REPORT: ACTION PLAN

The purpose of this document is to map out the actions required to take forward the recommendations from the Mid-Term Evaluation report. The recommendations are split into themes, namely 'building capacity and skills', 'maximising value and impact of public funds' and 'fostering relationships and growing collaborations' with the overarching aim to enable efficient regional delivery.

WEFO (Welsh European Funding Office) Evaluation: Action Plan

KEY: STATUS	
NOT STARTED	Red
ONGOING	Yellow
COMPLETE	Green

KEY AIM: ENABLING REGIONAL DELIVERY



RECOMMENDATION	AIM	TASK	RESPONSIBILITY	COST / RESOURCE	PROGRESS	STATUS	OUTPUTS / OUTCOMES	DEADLINE	SIGN OFF		
1. BUILDING CAPACITY AND SKILLS											
1.1	Need for enhanced risk assessment as project delivery ramps up	Upskill PMO (Programme Management Office) in risk identification, mitigation and management.	Commission accredited training for PMO staff – identify where training will be procured	Possibly list staff required to attend training and identify/ adjust timelines	Programme and Project Officers	Risk Training materials £420 PP (plus trainer expenses and Rate)	Avg. costs based on 12 attendees = £673.75	All key PMO staff to attend 3-day training course. Staff to take exam and gain accreditation.	Risk trained PMO staff	Complete May 23	Head of Operations (HVE)
1.2	Incorporate risk management learning as part of project planning and project delivery	Key staff to implement risk management learning as part of project planning and project delivery	Programme Managers / Project Managers	PMO Staff time undertake reviews in line with training. Agree risk management plan at	Staff have the necessary skills to implement enhanced risk assessments. This will continue to be implemented as projects progress into delivery	Managed risks, funders assured that risks are managed effectively	Ongoing	Head of Operations (HVE)			



		resilience across our partners in this area.	simplified version – subject to adequate funding availability.							
1.4	Accelerate the Five-Case Business Case approval process	Reduce time taken to approve FBC	Propose a streamlined approval route for Full Business Case (FBC) to ensure final investment decisions can be made in a timely and effective manner. Seek approval from the board on the process	Head of Operations	N/A	Streamlined FBC process approved by the Economic Ambition Board for projects that have not changed in scope from OBC approval.		Reduced time to commence delivery phase. Costing for project remain valid	May 23	Economic Ambition Board
1.5		Upskill and collaborate with partners to gain a shared understanding of the Business Cases	Share business case best practise. Document the dos and don'ts of business case submissions	Programme Managers / Project Managers	PMO Staff Time	Collate learnings and best practice information. Produce an exemplar file for business cases.		Templates shared with new projects during application process.	April 24	Head of Operations (HVE)



		standard required.				Share with project leads to use as a reference and guide as to the standard required.				
1.6	Partner training for Five-Case Business Cases	Partners build expertise in producing Better Business Cases.	PMO to offer drop-in sessions. Share best practice Feedback and improvement suggestions.	Programme Managers	PMO Staff Time	Head of Operations (HVE)	Quality Business Cases Less clarifications required Business Cases approved quicker	April 24		
2. MAXIMISING VALUE AND IMPACT WITH PUBLIC FUNDS										
2.1	Communication strategy update	Map out a fully detailed communication plan with actions, roles and responsibilities	Review of current communications. Update target audience and communication channels. Create a communications plan with updated information to	Senior Operations Officers	PMO Staff Time + Communications Budget £30,000	Survey undertaken to understand how effective stakeholder see the current communications and seek ideas for improvements. • Replaced weekly update with monthly update.	Promotion of Growth Deal opportunities and achievements Increased engagement and reach	April 23		Portfolio Director /



			ensure key messages have the desired impact. Create a communications activity timeline					This is for immediate Growth Deal Stakeholders. <ul style="list-style-type: none"> Produced new quarterly update for wider general public Created a communications plan: <ul style="list-style-type: none"> Mapped out communications activity for the next 12 months. Ensure flow of publications to maximise impact. 				
2.2	Sharing of best practice between projects	Sharing of information between other City and Growth Deal groups	Representation on regional City and Growth Deals PMO group. Project comparison across Growth Deals. Understand where there are	Portfolio Director / Program Managers	Staff Time to attend meetings	Attendance at Scottish and Ireland Growth Deals groups, shared progress and learning of benefits realisation. Present to PMO working group any findings.		Shared learning	Ongoing	Portfolio Director / Head of Operations		



			common indicators and alignment.										
2.3	Increase procurement capacity	Additional capacity to support procurement officer	Explore funding and training opportunities to support with procurement tasks	Sara Jones	£24,000 WG Grant	Potential candidates invited to apply for a 12-month placement in Procurement and Social Value. Date set to interview candidates. Recruit placement.		Additional Capacity Work experience	March 24	Portfolio Director / Head of Operations			
3. FOSTERING RELATIONSHIPS AND GROWING COLLABORATIONS													
3.1	Mapping of CCT's into projects (Welsh Language/Sustainability/Equalities)	Embed CCT's within the Growth Deal projects	Ensure Impact Assessments are completed and submitted with OBC and FBC. Ensure Impact reporting system is set up to capture progress	Programme Manager s / Project Managers / Project Sponsors	Staff Time	All projects are required to submit an IIA (Integrated Impact Assessment) with their OBC and FBC. Projects will report achievements against CCT (Cross		Project plans in line with WBFGA, equalities act and Welsh Language Act Higher profile of Wellbeing objectives	Review March 24	Head of Operations / Ambition Board			



3.2	Greater collaboration with Private Sector	Draw on the Private Sector expertise to fully understand the regional investment landscape. Finalise Investment Strategy	Host an event with the Private Sector to focus on Private Sector Investment Commission a consultant to lead on the investment plan in consultation with the Business Delivery Board (Private Sector)		Staff time + £15,000 Business Delivery Board	Event held – conclusions and recommendations incorporated into Investment Strategy. Preparing a brief to commission consultant Consultant Savilles awarded contract		Plan in place to achieve the investment target for the Growth Deal	Jun 24	Portfolio Director



4 Conclusions

4.1 The following conclusions have been drawn from the evidence provided during the stakeholder interview programme:

- **Current Status** – Stakeholders recognised that having only one project in the delivery phase at this point is behind schedule. Delays have been caused by a variety of identified reasons but there is confidence that momentum is starting to build, not least in those projects that are managed by the Economic Ambition Board, the hydrogen-related project being delivered under Low Carbon Energy, for example.
- **Progress Against Targets** – Performance against indicator targets has been an area of strength for the Operation, with all indicator targets being achieved or, indeed, exceeded. Since progress against targets was discussed in the Phase 2 mid-term report, it can be seen that the Benefits Realisation indicator was claimed in December 2022, with the Carbon Biodiversity Methodology receiving RME approval on 25 January 2023 (both outputs claimed in the January 2023 quarterly submission to WEFO).
- **Best Practice** – it was commented that a lot of best practice developed by the PMO team goes unnoticed, and a significant amount is built through learnt knowledge, i.e. process now more streamlined as a result of continuous improvements.
- **Best Practice** – tools and methodologies developed by the PMO Team, particularly the Benefits Realisation and Carbon Emissions and Biodiversity work, are recognised as ambitious but possibly UK-leading. It was identified that other PMOs view the Project Management Framework as close to best practice.
- **Consequential Benefits** – wider impact of the PMO Team's role is evidenced through in-depth knowledge of the five-case business model and dissemination of that knowledge to project partners, 'regionalisation' of discussions for vertical sectors, not least Energy, with the PMO now seen as a manager/coordinator by Local Authorities for delivery of Local Energy Plans, and perception of the PMO team as a 'touch point' within



the region, developing partnerships and collaborations within the discrete programme areas.

- **Unintended Benefits** – there was acknowledgement within the interviewee cohort that there is a need to properly define the consequential benefits of PMO activities and to better promote such impact to regional stakeholders
- **Cross Cutting Themes/WFGA** – CCT mainstreaming and WFGA Goals are a crucial aspect of the Benefits Realisation and Carbon Emissions and Biodiversity methodologies, which challenge projects to plan how they will deliver against such ambitions from the early stages. It was commented that the methodology is highly prescriptive, with good use of templates and pro formas, providing as much help to the individual projects as possible, whilst emphasising the importance of CCT and WFGA contribution. The Consultants believe such tools will be beneficial in relation to getting projects to deliver such ambitions.
- **Cross Cutting Themes/WFGA** – Programme managers recognised that, as with other areas of the PMO Team's role, significant evidence of contribution to CCT and the goals of the WFGA will be seen when projects reach the delivery phase and, as such, they were unable to provide significant evidence of CCT delivery to this point. It was recognised that projects in, for example, the Low Carbon Energy Programme, have the potential to deliver against the majority of WFGA goals.
- **Future Activities** – Short- to medium-term activities must continue to focus on delivery of the Growth Deal projects. Once the delivery phase is up and running, interviewees did acknowledge that, resource permitting, there is the potential for the PMO to provide significant input/influence into policy/strategy, and that this would be highly beneficial for the Region.



Appendix I: Logic Model

Annex B – Logic Model

Issues	Focus Area	Activities	Intended Results	Questions	Indicators	Information needed
The aims/objectives of the programme are:	Individual aim/objective	In order to address the aims and objectives we will accomplish the following activities:	All of the programme's desired results	Key questions or issues within the aim/objective	Data/information required to measure the success in answering the questions	List of specific data or information and its location
			Outputs, outcomes and impact	To what extent, how well, what was the quality of, cost justification etc	Counts of events, groups, times represented in groups. Case studies of events	Lists of groups, workshop, conferences. Attendance lists, membership lists, minutes of meetings
To facilitate regional collaborative working - to provide a change in building regional capacity; to enable closer working with the Welsh Government's Chief Regional Officer; and to deliver the emerging policies and be aligned to Regional Economic Frameworks.	<ul style="list-style-type: none"> Collaborative working 	<ul style="list-style-type: none"> Further develop the partnership approach in place through the NWEAB and the Executive Group Develop a partnership with WG and UKG 	<ul style="list-style-type: none"> Sharing resources Regional working Cultural change 	<ul style="list-style-type: none"> Do the current arrangements provide suitable leadership, control, engagement, expertise, decision making and accountability? Is there consistency and clarity on their roles and responsibilities? What works well/not so well? 	<ul style="list-style-type: none"> Membership / TOR No of meetings attended Quarterly annual reports 	<ul style="list-style-type: none"> NWEAB Board minutes - Public Executive Group - PMO WG & UK Gov - PMO
	<ul style="list-style-type: none"> Partnership approach through the NWEAB to provide strategic direction and outcomes 	<ul style="list-style-type: none"> NWEAB to lead on regional decisions 	<ul style="list-style-type: none"> Team North Wales Approach Regional Decision making Greater resilience 	<ul style="list-style-type: none"> How effectively has the PMO engaged with stakeholders? How well does this work? Is their voice 	<ul style="list-style-type: none"> Stakeholder survey / interview 	<ul style="list-style-type: none"> NWEAB Board minutes - Public Executive Group - PMO WG & UK Gov - PMO



Issues	Focus Area	Activities	Intended Results	Questions	Indicators	Information needed
	<ul style="list-style-type: none"> Pooling resources at a regional level 	<ul style="list-style-type: none"> Work collaboratively on a shared programme of work 	<ul style="list-style-type: none"> Better use of existing resources Maximise impact whilst minimising financial burdens Other sources of funding secured 	<ul style="list-style-type: none"> Have the aims, objectives and practises as set out in the WEFO business plan been achieved? Are there gaps, innovative ideas and best practise? Have they achieved their intended objective? Have there been any significant changes or lessons learnt? 	<ul style="list-style-type: none"> Desk based research to provide comparative analysis against baseline landscape Amount of other funding secured 	<ul style="list-style-type: none"> WEFO Business plan Minutes of meetings Business Delivery Board NWEAB Board Executive Group WG & UK Gov Workshops and events RSP Transport RET
	<ul style="list-style-type: none"> Regional communication 	<ul style="list-style-type: none"> Communications Plan including social media, website 	<ul style="list-style-type: none"> Streamlined messaging Extended "reach" and engagement Growing profile 	<ul style="list-style-type: none"> Are stakeholders, potential investors and the supply chain fully informed on progress and opportunities? Is this being done effectively, is there more/less that is needed? Is the format accessible, appropriate and readily understood? 	<ul style="list-style-type: none"> No of views on website No. of engagement events hosted No newsletters sent No Publications 	<ul style="list-style-type: none"> Mailing list Business Delivery Board RSP Transport RET NWEAB Board Executive Group WG & UK Gov Project Sponsors Community Supply Chain Potential Investors



Issues	Focus Area	Activities	Intended Results	Questions	Indicators	Information needed
<p>To provide a regional resource to oversee the implementation and delivery of the initial phase of projects which make up the Growth Vision</p>	<ul style="list-style-type: none"> Establish a Portfolio Management Office 	<ul style="list-style-type: none"> Recruit suitably qualified staff to the PMO PMO staff to receive on Better Business Cases training 	<ul style="list-style-type: none"> Team North Wales Approach 'Place-based' integration at a regional level Approved project FBC Project Management Framework 	<ul style="list-style-type: none"> How effectively has the PMO engaged with WG? Are the project assurance reviews well received? Are all recommendations actioned effectively and timely? 	<ul style="list-style-type: none"> No of PAR reviews held Regional representation at workshops Feedback analysis 	<ul style="list-style-type: none"> Internal external audits
	<ul style="list-style-type: none"> Collaboration with WG on the Regional Economic Framework 	<ul style="list-style-type: none"> Define and develop a Regional Economic Framework Host Workshops and Seminars with key stakeholders Work collaboratively on a shared programme of work to achieve the REF 	<ul style="list-style-type: none"> Regional Economic Framework for North Wales Influence and inform national policies and interventions – Regional Recovery Prospectus Shared priorities 	<ul style="list-style-type: none"> How effectively has the PMO engaged with WG and wider stakeholders? How well does this work? Is their voice heard and are they visible? Are stakeholders able to influence outcomes/decisions? 	<ul style="list-style-type: none"> Staff interviews 	



Issues	Focus Area	Activities	Intended Results	Questions	Indicators	Information needed
	<ul style="list-style-type: none"> Prepare and deliver 5 Case Business Models 	<ul style="list-style-type: none"> Undertake 5 case business model training Develop Programme and Project Business Cases utilising the Better Business Cases Methodology 	<ul style="list-style-type: none"> Trained PMO in Better Business Case methodology Successful delivery of the projects and programmes 	<ul style="list-style-type: none"> Are there opportunities to develop? Is the resource sufficient to effectively deliver the Growth Deal? 	<ul style="list-style-type: none"> No of staff trained 	<ul style="list-style-type: none">
	<ul style="list-style-type: none"> Deliver the North Wales Growth Vision 	<ul style="list-style-type: none"> Executive Officers Group to lead on refreshing the North Wales Growth Vision Develop an economic baseline Develop and deliver the Growth Vision Programmes and Projects 	<ul style="list-style-type: none"> Collaborative working Develop a pipeline of projects to deliver the North Wales Growth Vision Benefit Realisation (Long term impact not included in Interim Evaluation,) 	<ul style="list-style-type: none"> How effective are the processes, tools and methods that have been developed? What measurable outcomes, both intended and unintended, occurred? How much of these outcomes can be attributed to the intervention? Are these being utilised? How will these assist the future delivery of the Growth Deal? 	<ul style="list-style-type: none"> No of Integrated Impact Assessment completed No of project positively impacting social value and contributing to NET Zero Case study 	<ul style="list-style-type: none">
	<ul style="list-style-type: none"> Refresh the North Wales Growth Vision 	<ul style="list-style-type: none"> Understand and evaluate the evidence to inform the refreshed Growth Vision 	<ul style="list-style-type: none"> WG and the NWEAB working in the same 	<ul style="list-style-type: none"> Are stakeholders, potential investors and the supply chain fully 	<ul style="list-style-type: none"> No of views on website No. of engagement events hosted 	<ul style="list-style-type: none">



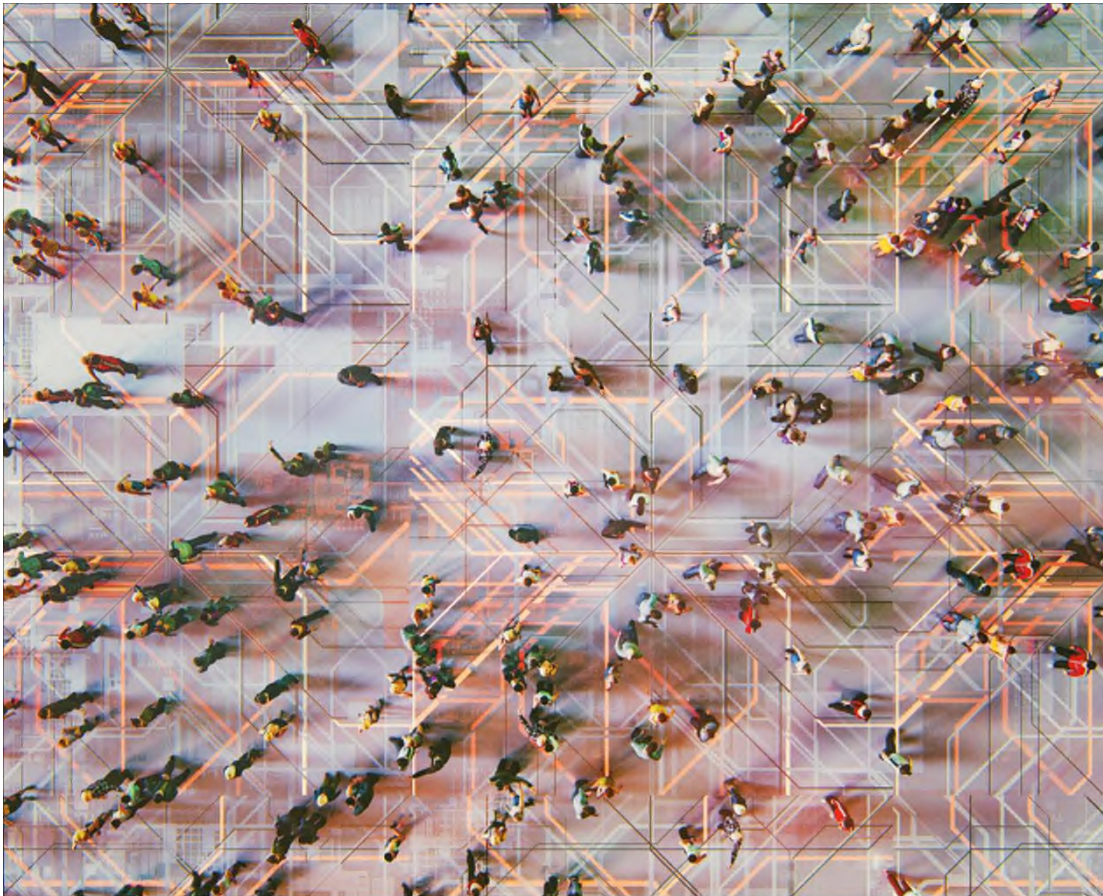
Issues	Focus Area	Activities	Intended Results	Questions	Indicators	Information needed		
	<ul style="list-style-type: none"> • Delivery of a clear model for portfolio, programme and project governance 	<ul style="list-style-type: none"> • Develop an economic baseline • Host Workshops and Seminars with key stakeholders 	<ul style="list-style-type: none"> • Adopt a delivery model based on best practice approach as set out in the 'Government <i>Functional Standard Gov 5002: Project Delivery</i>' • Develop and establish a delivery structure consisting of Sponsoring Group, Portfolio Board, Programme Board and Project Board 	<ul style="list-style-type: none"> • direction towards a shared ambition • Joined up vision for the North Wales Economy • New brand and website 	<ul style="list-style-type: none"> • Successful programme and project delivery • Portfolio, Programme and Project Governance Model GA2 Agreement 	<ul style="list-style-type: none"> ■ Informed on progress and opportunities? ■ Is this being done effectively, is there more/less that is needed? ■ Is the format accessible, appropriate and readily understood? 	<ul style="list-style-type: none"> • No of successful gateway reviews • No of SOC/OBC/FBC approved. 	<ul style="list-style-type: none"> ■ Reporting structure ■ PAR / IAAP ■ Minutes of meetings - decisions



Appendix II: Example Topic Guides



PMO Team Topic Guide



North Wales Regional Growth Vision Enabler (NWGVE) Project Evaluation – Phase 3 PMO Team Topic Guide

02/05/2023
Version: 0.1





INTRODUCTION

This topic guide has been designed by The Innovation Partnership Limited for use with Portfolio Management Office (PMO) for Phase 3 of the evaluation of the North Wales Economic Ambition Board (NWEAB), funded under ESF Priority Axis 5: ‘Public Services Reform and Regional Working’.

The interviewer will reiterate that:

- This interview can be conducted in English or Welsh.
- All responses will be treated in the strictest of confidence, anonymised in reporting, and will comply with all GDPR/data handling requirements. Responses will not be shared with anybody, including PMO staff.
- Interviews are scheduled to last circa 1 hour.

The output of this part of the exercise will be a co-produced (TIP/PMO) Action Plan.

SECTION 1: INTERVIEWEE DETAILS (not reported)

1.1 Interviewee:

Name	
Position	
Email	
Tel	

SECTION 2: ACTION PLAN

- 2.1 In relation to the conclusions/recommendations outlined in the evaluation report, what actions need to be incorporated into the co-produced Action Plan? (Note: ensure interviewee has a copy of the standalone executive summary document)

Key findings/Recommendations/Conclusions from Mid-term report:	
Management & Implementation:	
Enhanced risk assessment as project delivery ramps up to set out the level of confidence in timescales and how delays/changes impact the schedule and cost of a project	
Processes, Tools and Methods developed	



Short/Long-list of back up projects – This has been addressed with replacement project process		
Business case development/approval process complex – Streamline process, roll out Five-case business model training to all Project Sponsors		
Carbon Emissions & Biodiversity Methodology – too complicated – in some cases unrealistic. Addressed roll out of training across the region.		
Collaborative Regional Working		
Impact of the CJC (Corporate Joint Committees)		
Management & Governance		
Speeding up delivery of projects		
Greater collaboration with private sector		
Capacity		
Procurement		
Funding to deliver the Growth Deal		
Communication		
Transfer of knowledge between projects		
Updated plan with actions/roles and responsibilities		
CCT's & Project progress		
Benefits realisation risk not achieving outputs and outcomes.		
CCT approach to incorporating into project delivery – IIA completed for each project		

SECTION 3: PMO ACTIVITIES



3.1 Can you identify examples of best practice from the delivery of the PMO to this point?

3.1.1 If yes, how/why (potential outcomes) should they be shared with colleagues, stakeholders and beneficiaries?

3.2 Which interventions (tools/methodologies) employed so far have been successful? (Probe: why and for whom?)

Tools Processes Methods claimed	
Project Management Framework	
Recovery Prospectus	
Benefits Realisation (plan/framework/reporting)	
Carbon Emissions and Biodiversity methodology	
Other interventions	

3.2.1 How and why (possible outcomes) will the PMO sustain such interventions until the end of operations?

3.3 Do you believe the PMO has delivered Value for Money?

Yes • No •

3.3.1 If yes, please provide examples and evidence:



3.4 What have been the:

3.4.1 Consequential benefits of the PMO role to date:

3.4.2 Benefits as a result of activities not planned at the start of operations:

3.4.3 Additional impacts:

3.4.4 Additional groups/sectors engaged:

SECTION 4: ACTIVITY REACH

4.1 What activities should the PMO be delivering more of and why?

4.2 What activities should the PMO be delivering less of and why?

SECTION 5: CROSS-CUTTING THEMES

5.1 How is the operation performing in terms of delivery and mainstreaming of CCT as set out by WEFO, including the case-level indicators outlined below? (Probe: encouraging sustainable development, addressing Equality & Diversity challenges – what worked well/what didn't, how were issues addressed?)

- Actively supporting speakers of the Welsh language
- Developing / engaging CCT Champions
- Resource efficiency measures



5.2 How has the team contributed to the following goals of the Well Being and Future Generations (Wales) Act, 2015?

5.2.1 A Prosperous Wales:

5.2.2 A Resilient Wales:

5.2.3 A More Equal Wales:

5.2.4 A Heathier Wales:

5.2.5 A Wales of Cohesive Communities:

5.2.6 A Wales of Vibrant Culture & Thriving Welsh Language:

5.2.7 A Globally Responsible Wales:

SECTION 6: FUTURE ACTIVITIES

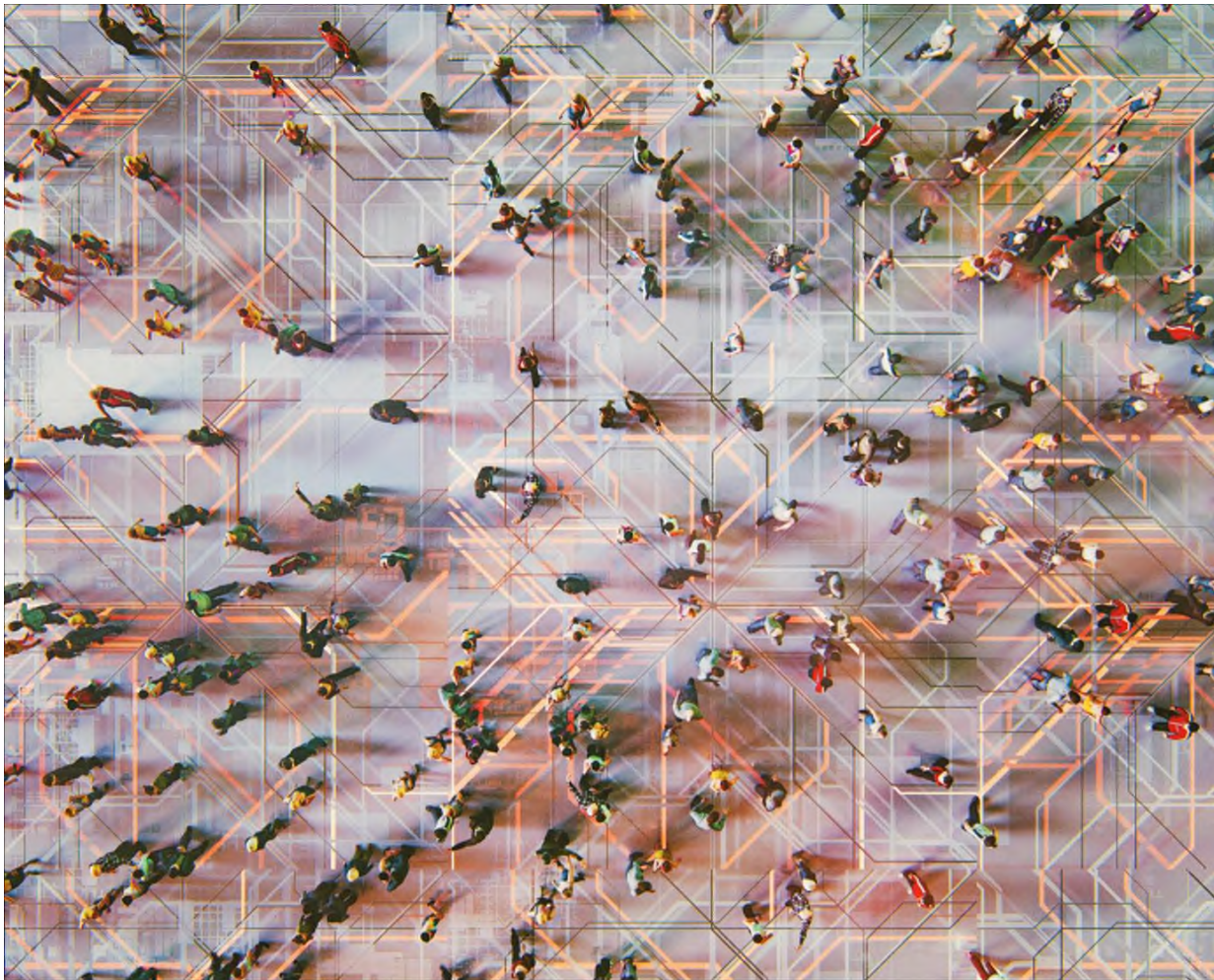
6.1 How does the role of the PMO feed into future programme development?

6.2 How does the role of the PMO feed into future policy development?

6.3 What other regional/national activities could the PMO deliver/link to in the short-term?



6.4 Any other observations, suggestions or recommendations:



North Wales Regional Growth Vision Enabler (NWGVE) Project Evaluation – Phase 3 Programme Managers Topic Guide

02/05/2023
Version: 0.1





INTRODUCTION

This topic guide has been designed by The Innovation Partnership Limited for use with the Programme Manager Team for Phase 3 of the evaluation of the Ambition North Wales PMO Team, funded under ESF Priority Axis 5: 'Public Services Reform and Regional Working'.

The interviewer will reiterate that:

- This interview can be conducted in English or Welsh.
- All responses will be treated in the strictest of confidence, anonymised in reporting, and will comply with all GDPR/data handling requirements. Responses will not be shared with anybody, including PMO staff.
- Interviews are scheduled to last circa 1 hour.

SECTION 1: INTERVIEWEE DETAILS (not reported)

1.1 Interviewee:

Name	
Position	
Email	
Tel	

SECTION 2: CURRENT PROGRAMME STATUS

- 2.1 Please provide an update on progress within your programme area: (Probe: number of projects approved and current status of projects, if delays have occurred, please provide reasons/context for those delays/barriers to progress)

SECTION 3: PMO ACTIVITIES

- 3.1 Can you identify examples of best practice from the delivery of the PMO to this point? (Probe: marketing, communications, applicant/team support/development)



3.2 Which interventions (tools/methodologies) employed so far have been successful? (Probe: why and for whom?)

Tools Processes Methods claimed	
Project Management Framework	
Recovery Prospectus	
Benefits Realisation (plan/framework/reporting)	
Carbon Emissions and Biodiversity methodology	
Other interventions	

3.3 Do you believe the PMO has delivered Value for Money?

Yes • No •

3.4 What best practice has been developed in the engagement with your sector since the start of the Programme?

3.5 What have been the unintended benefits/consequential impacts of the PMO's role to date?

SECTION 4: CROSS-CUTTING THEMES

4.1 How is the operation performing in terms of delivery and mainstreaming of CCT as set out by WEFO, including the case-level indicators outlined below? (Probe: encouraging sustainable development, addressing Equality & Diversity challenges – what worked well/what didn't, how were issues addressed?)

- Actively supporting speakers of the Welsh language
- Developing / engaging CCT Champions
- Resource efficiency measures



4.2 How has the PMO’s role contributed to the following goals of the Well Being and Future Generations (Wales) Act, 2015?:

4.2.1 A Prosperous Wales:

4.2.2 A Resilient Wales:

4.2.3 A More Equal Wales:

4.2.4 A Heathier Wales:

4.2.5 A Wales of Cohesive Communities:

4.2.6 A Wales of Vibrant Culture & Thriving Welsh Language:

4.2.7 A Globally Responsible Wales:

SECTION 5: ACTION PLAN & FUTURE ACTIVITIES

5.1 In relation to the conclusions/recommendations outlined in the evaluation report, from a Programme Manager’s perspective, what actions would you like to see incorporated into an Action Plan for future PMO activity? (Note: ensure interviewee has a copy of the standalone executive summary document)

Management & Implementation:	
Enhanced risk assessment as project delivery ramps up to set out the level of confidence in timescales and how delays/changes impact the schedule and cost of a project	
Processes, Tools and Methods developed	
Short/Long-list of back up projects – This has been addressed with replacement project process	



Business case development/approval process complex – Streamline process, roll out Five-case business model training to all Project Sponsors	
Carbon Emissions & Biodiversity Methodology – too complicated – in some cases unrealistic. Addressed roll out of training across the region.	
Collaborative Regional Working	
Impact of the CJC (Corporate Joint Committees)	
Management & Governance	
Speeding up delivery of projects	
Greater collaboration with private sector	
Capacity	
Procurement	
Funding to deliver the Growth Deal	
Communication	
Transfer of knowledge between projects	
Updated plan with actions/roles and responsibilities	
CCT's & Project progress	
Benefits realisation risk not achieving outputs and outcomes.	
CCT approach to incorporating into project delivery – IIA completed for each project	

5.2 How does the role of the PMO feed into future programme and policy development?

5.3 Any other observations, suggestions or recommendations:



Appendix III: Stakeholder Consultees

Name	Position	Organisation
Hedd Vaughan-Evans	Head of Operations	Portfolio Management Office, ANW
Robyn Lovelock	Agri-food and Tourism / Innovation in High-Value Manufacturing Programme Manager	Portfolio Management Office, ANW
Stuart Whitfield	Digital Programme Manager	Portfolio Management Office, ANW
David Matthews	Land & Property Programme Manager	Portfolio Management Office, ANW
Henry Aron	Energy Programme Manager	Portfolio Management Office, ANW



Appendix IV: Case Studies

Provided under separate cover.