Project Management Task and Finish Group Report

Committee considering report:	Resources and Place Scrutiny Committee
Date of Committee:	17 March 2026
Task & Finish Group Chairman:	Councillor Chris Read
Date Task & Finish Group Chairman agreed report:	5 March 2026
Report Author:	Gordon Oliver (Principal Policy Officer)

1 Purpose of the Report

This report presents the findings of the Project Management Task and Finish Group, which reviewed the Council's approach to managing major projects and sought to identify lessons to be learned from recent projects, including Care Director v6, and iTrent (Phase 1). The report makes recommendations based on the evidence gathered, which (if implemented) would help to inform the Council's approach to project management in future.

2 Recommendation

To consider the Task and Finish Group's recommendations as outlined in Section 6 of this report and agree whether these should be referred to the Executive for consideration.

3 Implications and Impact Assessment

Implication	Commentary
Financial:	There are no financial implications arising directly from this report, although if the Task and Finish Group's recommendations are accepted, this may result in financial implications which will be assessed in detail in the response to the Executive.
Human Resource:	There are no HR implications arising directly from this report, although if the Task and Finish Group's recommendations are accepted, this may result in HR implications, which will be assessed in detail if they are taken forward.
Legal:	There are no Legal implications arising from this report, although if the Task and Finish Group's recommendations are

	accepted, this may result in financial implications which will be assessed in detail in the response to the Executive.			
Risk Management:	There are no risk management implications arising directly from this report, although if the Task and Finish Group's recommendations are accepted by the Executive, this may result in risk management implications, which will be assessed in detail if they are taken forward.			
Property:	There are no property implications arising directly from this report.			
Policy:	There are no policy implications arising directly from this report.			
	Positive	**Neutral**	**Negative**	**Commentary**
Equalities Impact:				
A Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		X		There are no equalities implications arising directly from this report.
B Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		X		The proposed decision does not have any impact upon the lives of people with protected characteristics.
Environmental Impact:		X		There are no environmental impacts arising directly from this report.
Health Impact:		X		There are no health impacts arising directly from this report.
ICT Impact:		X		There are no ICT impacts arising directly from this report.
Digital Services Impact:		X		There are no impacts for Digital Services arising directly from this report.

Council Strategy Priorities:		X		There are no Council Strategy Priorities arising directly from this report, although if the Task and Finish Group's recommendations are accepted by the Executive, this would have positive implications for delivery of projects related to Council Strategy priorities in future.
Core Business:		X		Improving project management and project governance is part of the core business of delivering services.
Data Impact:		X		There are no data impacts associated with this report.

Consultation and Engagement:	A full list of stakeholders and expert witnesses consulted is contained in the Task and Finish Group's report.

4 Executive Summary

4.1 This report presents the work undertaken by the Task and Finish Group set up by the Resources and Place Scrutiny Committee to review the Council's approach to managing major projects and identify lessons to be learned from recent projects, including Care Director v6, and iTrent (Phase 1).

4.2 Members of the Resources and Place Scrutiny Committee are invited to review the recommendations and consider whether these should be put to the Executive for consideration.

5 Supporting Information

Introduction

5.2 At its meeting on 13 March 2025, the Scrutiny Commission agreed the terms of reference and membership for a Task and Finish Group to review the Council's approach to managing major projects and identify lessons to be learned from recent projects, including Care Director v6, and iTrent (Phase 1).

5.1 The scope of the review included the following elements:

- Contract management
- Project management methodology
- Project management structure
- Resourcing
- Project governance

- Factors affecting project outcomes
- Lessons learned, changes to processes

5.2 A copy of the Task and Finish Group's terms of reference is provided as Appendix A.

Background

5.3 The Task and Finish Group met five times between September 2025 and January 2026. Members heard evidence from a variety of West Berkshire Council (WBC) officers, including procurement professionals, project managers, client teams, project sponsors, technical specialists, and auditors. Supplier representatives were invited to give evidence, but those who had been involved in the projects had either left the organisation or had moved to new roles in different part of the business, so were unavailable.

5.4 The Task and Finish Group also undertook primary research via an online survey of staff who had been involved in user acceptance testing of Care Director 6.

5.5 In addition, best practice exemplars of local authorities that had already improved their project management practices were sought out to understand what changes they had introduced, and to see if any of the lessons they had learned could be applicable to West Berkshire Council. Local authorities contacted included Kent County Council and Winchester City Council.

5.6 Through evaluation of the evidence collected and with technical support from officers, Members have been able to highlight a number of issues and identify where it is considered that potential improvements could be made, or where further work would be beneficial.

Proposals

5.7 The Task and Finish Group has developed a set of recommendations as set out below. Subject to the approval of the Resources and Place Scrutiny Committee, these recommendations will be referred to Executive for consideration at a later date, accompanied by a management response.

Procurement and Contracts and Supplier Relationship Management

Ref.	Recommendation
1.	For all major projects, suppliers must be asked to confirm what project management methodology they will be using.
2.	The Council must look 24 months ahead to identify where software support agreements for business critical systems are due to expire and procure replacements in good time to avoid unnecessary risk.
3.	Before commissioning major IT projects, there should be a full evaluation of all potential procurement options. This should be informed by the views of technical staff and other stakeholders who work with existing systems and

	suppliers. Any concerns raised should be captured in the risk log, which should be passed to the project team once procurement is complete.
4.	The Council should develop and maintain a live list of all IT systems and how they are integrated. This must be consulted when procuring all new IT systems to ensure the necessary system compatibility and functionality is specified and could be delivered by the new supplier. Any procurement of new IT systems should be signed off by the Council's ICT Service and the Project Sponsor.
5.	Wherever possible, the Council should seek to adopt standard business processes/working practices to avoid the need for IT product customisation, since bespoke changes can lead to unnecessary delays, project costs and risks.
6	Contracts for new IT systems must require suppliers to provide complete systems (including all necessary middleware and technical integration software) and associated product support for the life of the contract.
7.	Procurement timescales should factor in the potential for slippages, or failure to secure a new contract or, in extremis, the need to restart the procurement process.
8.	As part of due diligence, financial checks must be carried out on all contracts for business critical goods and services in order to be assured of the providers' financial viability. This needs to be done as part of the tender process, and at least annually thereafter as part of routine contract management. This should be done by an officer from Finance, Audit, or Procurement & Commissioning.
9.	Contract payments should be aligned clearly with project gateway review success. Large pre-payments before projects commencement should be avoided. Final payments should be set at an appropriate level to cover snagging issues and incentivise providers to complete in a timely manner.
10.	Contracts for critical services should include exit clauses to facilitate the handover of work and the onboarding of the new supplier at the end of the contract. The professional service rates should be clearly stated in the contract for exit services to be provided by the supplier. In many cases, the project/contract manager will be agreeing the detailed exit plan within a certain time period of contract signature, so it may be useful to develop guidance on this.
11.	In addition to all project managers, all Managers at Service Lead and above should have contract management training as part of their induction, with refresher training every three years thereafter. Service Leads should ensure there is a documented service review of all major contracts under their purview at intervals according to Recommendation 8 above.

Project Resources

12.	Cost benefit analysis should be undertaken over the lifetime of projects to inform decisions about delivery mechanisms. Similarly, there should be detailed up-front planning, mapping and costing of resources to inform the decision about whether to deliver projects using internal or external resources. A clear risk statement must be presented to the Project Board and Senior Leadership Team of resource commitment before approval of project commencement.
13.	Data ownership risk must be fully recorded in project and handed over to business on go-live. Full mitigation of the data loss risk must be adhered to at all times.
14.	All major projects must make use of **RACI** matrices to: • Identify who is **R**esponsible for delivery of each task. • Clarify who is **A**ccountable for decisions or delegations related to that task. • Specify who must be **C**onsulted before decisions are made about the task. • Identify who needs to be kept **I**nformed of progress.
15.	Staff, who need to manage major projects or be significantly engaged on these projects should not be asked to do this on top of business-as-usual activity. Instead, staff should have their substantive roles backfilled to allow them to focus on any major projects they are managing, or external project management support should be bought in. If this is not possible, then consideration should be given to what activities can be paused/scaled back for the duration of the project.
16.	Single points of failure should be avoided where an individual member of staff is the sole subject matter expert within the organisation.
17.	All projects must be properly scoped at the outset, with all West Berkshire Council actions and dependencies fully detailed. The scope must be signed off by all services that are key to delivery of a project, and resources must be allocated to tasks prior to project plans being signed off.
18.	Under the detailed project planning process, project dependencies must be identified, mapped, monitored and reported to the Project Board to highlight the implications of amending project timescales. Delays in the delivery of major projects must be taken into account when planning future staff workloads.

Project Deliverables

19.	For each project, there must be a clearly stated set of requirements that must be achieved in order for the project to be considered successful.

	Consideration should be given to use of the MoSCoW technique when defining these requirements. .
20	Large projects should be completed in phases, with business-critical aspects delivered first.

Risk Management

21.	All major projects must have risk registers that are kept updated and reported to the relevant project board on a regular basis. This must not be delegated to the supplier.
22.	For ICT projects, adopting new/unproven solutions for critical systems, or moving a critical system from a server-based solution to a hosted platform at the same time as undertaking a complex change / upgrade are considered to be excessive risks and should be avoided.

Project Governance and Decision Making

23.	All projects must define tolerances around time (project milestones), budget and resources at the outset, and these must be the central focus for RAG progress reporting. Any deviation (or risk of deviation) from baselined tolerances must be reported as project exceptions and options to either accept the deviation or to take another option must be recorded in the Project Board Decision Log.
24.	Change logs must be used to track all modifications to a project's scope, schedule, budget, or deliverables, documenting the "what, when, who, and why" for each alteration. The Change Log should indicate whether the project needs to be re-baselined. Every change should be analysed for any deviation this may or will cause to the agreed tolerances (see Recommendation 23).

Audit

25.	It is recommended that Internal Audit should undertake a further review 18 months after this report has been considered by the Executive. This would establish whether the accepted Task Group recommendations have been implemented, and whether they have been effective in addressing the identified concerns. A summary of the findings should be reported to the Governance Committee.

6 Other options considered

The Resources and Place Scrutiny Committee may choose to accept the Task and Finish Group's recommendations in full or in part, or amend the recommendations before putting them to the Executive. Alternatively, the Committee may choose not to put any of the report's recommendations to the Executive if it considers that they are not appropriate.

7 Conclusion

7.1 The proposals outlined in Section 6 above have been agreed by the Task and Finish Group, based on the evidence presented. It is considered that these could be applied to similar projects in future.

7.2 While some of these proposals could be actioned relatively quickly, at minimal cost and with existing resources, it is recognised that others may have financial and resource implications.

8 Appendices

Appendix A – Task and Finish Group Terms of Reference

Appendix B – Task and Finish Group Report

Background Papers:

None

Subject to Call-In:

Yes: ☐ No: ☒

The item is due to be referred to Council for final approval ☐

Delays in implementation could have serious financial implications for the Council ☐

Delays in implementation could compromise the Council's position: ☐

Considered or reviewed by Scrutiny Commission or associated Committees, Task Groups within preceding six months ☒

Item is Urgent Key Decision ☐

Report is to note only ☐

Wards affected: N/A

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