**To: UC Programme Board Members**

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| **Date:** | **15 March 2022** |

**Paper Title:** Product Development phase 11: midphase review summary

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**Issue:** UC Product development operates in phases. Phase backlogs are currently reviewed by the Programme Delivery Executive (PDE) before a phase starts and at the midphase point. This paper is to inform the Programme Board of the considerations and decisions PDE has taken at the midpoint of phase 11.

**Recommendations/Decisions required:**
- **For Information**

**Timing:** March Programme Board

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## Introduction
1. This update provides a mid-way checkpoint during phase 11 to identify where things have changed in our understanding since the start of the phase and how this has changed the phase priorities.
2. There has been some impact on the work originally committed to Phase 11 due to the combination of a high number of software engineers leaving and creating new teams for Move to UC and Targeted Case Review.
3. This paper highlights those areas that are at risk whilst providing reassurance on our fixed date commitments and other progress of particular interest.

## Summary
4. This paper has been brought to this meeting to provide assurance to the Programme Board on the midphase review conducted at PDE.

## Decision / Recommendation
*Please indicate whether:*
5. The paper is provided for information

## Phase context

6. Phase 11 started on 25 November 2021 and runs until 25 May 2022. The midphase review was undertaken at PDE on 2 March 2022.

7. At the beginning of the phase, we made the following assumptions which were agreed at PDE:

   o Kickstart uprating and other non-UC service maintenance would not be picked up by UC theme teams
   o Restart eligibility changes would be agreed and therefore have been prioritised for P11
   o For all the theme teams, except for Move to UC and Targeted Case Review, we planned based on current team capacity, which was lower than phase 10
   o For Move to UC and Targeted Case Review, we planned on the assumption that we will be able to get the capacity we need
   o Velocity and pace of all teams would be impacted as we use existing team member knowledge and time to onboard new members to grow 3 additional teams
   o Any dates agreed in the SR would not change

8. The following resource constraints were factored into the midphase review:
   - 8 of the 14 theme teams at the start of the phase now have fewer developers
   - 5 of the 14 theme teams at the start of the phase have lost their tech lead, who are some of our most experienced engineers
   - Over the past 12 months we have recruited 145 people, of which 20 were developers
   - Over the past 12 months we have had 103 people leave, of which 25 were developers; this accounts for 25% of our team, or 30% of our developers
   - We still have 20 developer vacancies unfilled, which accounts for 20% of our total headcount
   - Hiring and onboarding this many people is having a detrimental impact on the remaining peoples' ability to deliver

9. We have categorised the problems we are looking to solve into 3 broad categories to understand the split of investment. Exploration is where a problem or part of the service is being investigated. Investment is where a new attribute is added to the service adding long term value. Maintenance is all technical maintenance, product support and keeping the service current (including updating for compliance or policy changes such as uprating).

10. The expected investment split for phase 11 breaks down as follows:
    a. Exploration: 21%
    b. Investment: 29%
    c. Maintenance: 50%

## Key prioritisation decisions

11. As the Programme Board are aware, we created an additional 2 teams and new portfolio to provide the capacity required to deliver the Move to UC discovery phase.

12. Given the challenges set out above, in order to protect Move to UC we have needed to take developers from another team and stand down that team whilst we rebuild capacity.

13. The knock on impact of this is that work within the 'help claimants show eligibility' theme will need to be deprioritised or absorbed by other UC teams.

14. A similar situation arises from the need to prioritise work to support Targeted Case Review. An additional theme team has been created and bolstered by a supplier but it will require significant effort from another Fraud and Error team to get the supplier developers up to speed on UC.

15. Specific impacts from these constraints are:

- We have prioritised Move to UC over Habitual Residence Test, and 'Residency' has been moved to the "help claimants start UC and confirm identity" theme team
- We had planned to work on better support for claimants who go to prison and better understanding if claimants are homeless. Given the resource constraints in the barriers portfolio we are unlikely to complete both.
- We had hoped to move on to work to enable a digital claim to be converted to a telephony claim where a claimant is unable to manage a digital account. This was always planned after the prisoners and homelessness work, and is now unlikely to happen this phase.
- Discovery work planned in the help claimants show eligibility team on using $2^{nd}$ property data to inform Capital declaration validation has been moved to the UC CDDT Capital strand.
- In order to support other priorities, work on the strategic end to end fraud process will need to be reviewed for prioritisation in phase 12. Some of this work will need to be completed by other theme teams. The work required by the fraud and error theme team will be started once the Targeted Case Review onboarding is complete.
- We are prioritising identifying returning claimants over HRT in the "help claimants start UC and confirm identity" but we may need to review this once it has been fully impacted.
- Improvements made to the Capital gather for new claims have shown a marked increase in the proportion of claimants declaring Capital at the start of their claim. Further analysis is required on the results of this work to determine the priority of making similar enhancements to the change of circs declaration.
- Additional requests to support changes in operations have not been added to phase 11 scope:
  - Test of a 'Doubt of Entitlement' process for people with long term sanctions
  - Request for REEP sites to be decoupled from owning sites in order to gather MI (estimated 58 days Delivery Unit work for a team).
  - Need to reduce overturned MR decisions which would require work on the MR process

**Annex: Summary of fixed commitments in P11**

| Commitment | Status |
| --- | --- |
| Extending the Restart eligibility criteria to in IWS 9 months+ | **Complete** |
| Restart To Do content changes including GSE | **Complete** |
| Introduction of new Restart Eligibility criteria to UC 9 months+ and Workgroups | Not started |
| **Gov.Verify -** works to ensure we can support potential claimants when the service is toggled off 1$^{st}$ April. | **On Track** |
| **Frontier Workers –** development work ready for delivery in March | **On Track** |
| **Payments disregards for Capital** – completed on time in January | **Completed** |
| **Annual Rent changes April 1$^{st}$** Work for this is progressing well. Landlords aware of removal of tolerance and additional work is planned to ensure the stability of the Landlord Portal to support the additional verifications. | **On Track** |
| **Terminal Illness -** Work to change Terminal Illness definition from 6-12 months for 4$^{th}$ April | **On Track** |
| **Disabled Students Judicial Review –** A process to assess disabled student's eligibility, implement a new regulation was put in place in December 2021. | **Completed** |
| UC uprating of elements and other benefits 2022 due in April. | **On track** |
| **POCA Migration –** Sending out final run of reminder notifications (letter to phone claimants & digitally to everyone else).  Started a run of calling claimants to ensure they are aware and to clarify details. Finalised migration letter and plan is to move all claimants in 3 lots (end of Feb, mid-March and end of March) | **On Track** |
| **NI Credits** – First handover from team Too took place last week. Team are currently doing a deep dive into the code base and documentation to understand requirements/priorities. Further work required to deal with HMRC response to 20/21 FY and beyond | **On-going** |
| **February Payments** – there was no need to introduce throttling of Faster Payments this year as the service had enough capacity | **Completed** |