Psoda

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NATALIE YOUNG

Hamilton City Council

Hamilton City Council
Te kaunihera o Kirikirioa

IMPROVED PROJECT TRANSPARENCY ENABLES HAMILTON CITY COUNCIL TO TAKE THE LONG VIEW

CASE STUDY: HAMILTON CITY COUNCIL

Psoda provides Hamilton City Council with a "single source of the truth" for its capital portfolio planning & implementation

Long term planning is hard work - especially when trying to decide the direction of a city of over 160,000 residents for the next decade.

Keeping track of the countless reports, meeting notes, decisions made and potential outcomes in any portfolio of projects is never an easy task - especially if all that information is stored in spreadsheets saved in individual folders across an organisation - or just in people's heads.

This was the challenge Hamilton City Council faced when it started the process of developing its 10-year capital portfolio plan.

Hamilton, located in the central North Island, is New Zealand's largest inland city with a population of roughly 160,000 people.

⦿ THE SITUATION

The purpose of the 10-Year Plan was to outline the council's intended investment and expenditure over the next decade to develop and operate the core infrastructure which keeps the city running - such as roads, water supply, stormwater, wastewater, parks, attractions and amenities.

Development of the plan required using growth forecasts to understand future demand and population growth in order to decide what infrastructure will be needed and when, along with how much it will cost to deliver and where the revenue will come from.

This process was going to generate screeds of data, which would need to be captured, analysed and fed into decision making that would influence the city's direction for years to come.

Following a debrief from the Council's previous 10-Year Plan process, it was identified that a central capital repository was required to collate, store and interpret all the information resulting from the next 10-year and 30-year planning process.

Previously the council used spreadsheets to manage its capital portfolio, but this system presented several issues.

"One of the big issues for us was visibility," says Hamilton City Council Portfolio Management Office Manager Natalie Young.

"With spreadsheets, our data was never in a single repository - information was being held by individuals across the organisation, so it was not visible to people. We couldn't go back and see our projects easily."

Another major challenge was version control, says Young. "There was never certainty about which version of a document was the right or most recent one. Also, more than one person couldn't use the same spreadsheet at the same time."

CHALLENGES:

No **visibilty** over all programmes and projects

Uncertainty over **version control**

Different **growth scenarios** needed to model

Tight timeframe to implement a tool

SOLUTIONS:

Psoda became a **single repository** for all programmes and projects

Psoda allows you to **filter** by most recent versions or date on any documents/data

Psoda's **scenario planner** enabled HCC to model different outcomes

The **flexibility** of Psoda, and the **responsiveness** of the team ensured a smooth roll-out

☀ THE SOLUTION

To avoid these issues, Hamilton City Council chose to use Psoda to manage its 10-year capital portfolio planning process.

Psoda became a single repository for all the programmes and projects in the council's 10-year capital portfolio plan.

"We were able to keep building on this repository over time developing an invaluable database of all of our projects," says Young.

"We could capture programme and project detail so that any staff member could understand each project."

Keeping thorough change logs has enabled the council to keep accurate records of key decisions made during the 10-year planning process.

"We can go back and understand the process we went through in making decisions on projects. Before, people would put their projects into a spreadsheet and decisions made were not visible and so it was difficult to understand how or why the project changed," says Young.

"Having records of what changes and decisions were made - and why - during the planning process stored in a single database within Psoda, has made the process more transparent for people."

💡 THE SOLUTION: MODELLING COMPLEXITY

The 10-year planning process was very complex due to the different growth scenarios the council wanted to model. Psoda enabled the council's PMO to run multiple scenarios within the tool by effectively turning certain projects "on" or "off" at will to model different outcomes.

This ability to select and unselect projects in Psoda was very useful, says Young.

"We were able to track through Psoda what projects were in and what projects were out of certain scenarios. We didn't have to delete any projects throughout the whole process - we could just select or de-selected them, as needed," she says.

"We built seven scenarios based on different growth levels in particular areas and then refined those down to two to present to council. Once the Council decided on its preferred scenario, we developed detailed data for all the proposed programmes and projects in the 10-year plan."

Psoda was used to map each project to a portfolio and a programme, and to then to map all projects to activities in the 10-Year Plan.

With Psoda, the council could add custom fields and tags to the tool, allowing it to sort the data any way it wanted.

"This gave us the ability to provide a lot better information to enable informed decision making through the 10-year planning process," says Young.

Data from Psoda was also exported to other systems in the 10-Year Plan, such as the council's financial system, depreciation model and development contributions model.

SCENARIO PLANNER
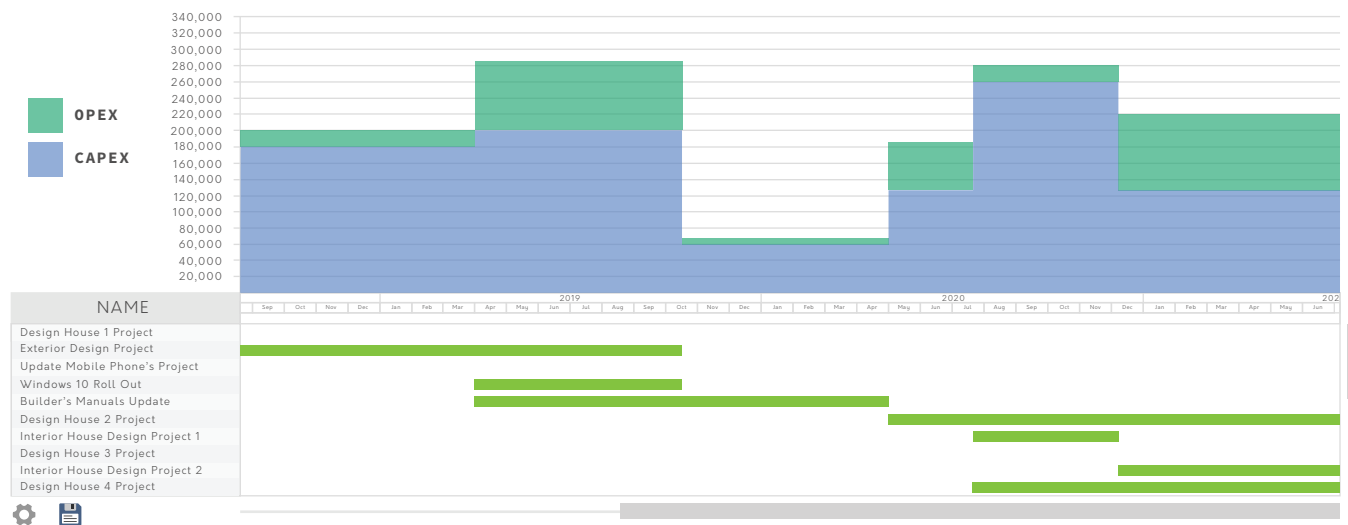
THE SOLUTION: SMOOTH IMPLEMENTATION

Despite the tight timeframe before launching the 10-year planning process, the implementation of Psoda went smoothly - even though there was little time to customise the tool beforehand.

"Basically, we just had to start. If we aimed for a perfect tool upfront, we wouldn't have started in time. We were very open with our users that the tool would evolve with the 10-Year Plan process and that we would support them in whatever way we could," says Young

"We added fields to give us more flexibility, but we just had to keep it quite simple in order to start."

The flexibility of the Psoda system, along with the responsiveness and support provided by Psoda CEO Bruce Aylward, helped ensure a smooth roll-out.

"Having a responsive vendor, and a system that is flexible, and not clunky and constrained by rules, was vital because we needed a system that would meet our needs," says Young.

"One of the main reasons we went with Psoda, was that I knew that Bruce was very responsive. He helped train the main users and was available by phone at any time we needed help. If we needed something changed in the system, Bruce would deal with it right away. That responsiveness is very important when you're under pressure like we were."

THE OUTCOMES

Since implementing Psoda to manage its 10-year capital portfolio plan, the council now uses Psoda as its capital portfolio delivery tool.

The key benefit of using Psoda is the transparency and visibility of the entire capital portfolio it provides, says Young.

"Psoda gives us a single source of the truth. That means we know what's happening across the portfolio. We can have the right conversations, because we all are talking about the same thing."

Using Psoda as a live risk register means issues can be recorded and tracked easily.

"Often in the past, you would do a risk register and it would sit in your drawer and you might never visit it again. Now we can communicate and escalate issues through the tool, and there are processes to support that. The risk register is now interactive, and the information is live."

Overall, the greater visibility and access to information provided by Psoda has provided the PMO with a solid base for delivery and implementation, says Young.

"Having greater transparency and visibility has been a great benefit. It has given us the ability to tell a cohesive story and to see where we're going and what we need to do next. The ability to re-prioritise and understand the impact of any changes is really important."

5
DAYS TO CREATE REQUESTED SCENARIO PLANNER

22
DETAILED SCENARIOS MODELLED

THE OUTCOMES: LOOKING AHEAD

Having Psoda now embedded in the organisation's processes will ensure the next round of long-term planning will go even more smoothly, says Young.

"We have a statutory requirement to undertake the 10-year planning process every three years. People expect Psoda to be just part of the process now, as it is our portfolio planning and delivery tool," says Young.

"Not having to implement a new tool for the next 10-year plan will save a lot of energy. We will start on the front foot and have the opportunity to focus on making improvements, such as developing an automated approach for updating data for the next plan."

The Council also plans to add more of Psoda's functionality to its users.

"We'll be looking to put our operating projects onto Psoda. We are also looking at how we can integrate with our geographic information system, so that we can map out data in Psoda. Plus, we'll be looking to improve on our reporting."
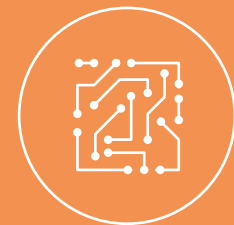
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