**NHSD Milestone Guidance**

### 

**Introduction**

Planning takes place at multiple levels within a programme and the types of milestones with their associated levelling determine the appropriate audiences for effective milestone reporting. The top-level milestones enable:

* A common language for communications across the portfolio and between programmes
* An understanding of Interdependencies between programmes
* Progress of the portfolio to be managed by the various governance bodies
* Provides an effective baseline for change control
* Recognition of a key achievement

**Definitions:**

**Milestone**

A significant event such as completion of key Work Packages, a technical stage, or a management stage.

**Outcome**

The result of a change, normally affecting real world behaviour or circumstances.

**Output**

The tangible of intangible artefact produced, constructed, or created as a result of a planned activity.

**Benefits**

The measurable improvement resulting from outcome perceived as advantageous by one or more stakeholders.

**What is the difference between an Output and an Outcome?**

Outputs are the artefacts delivered by projects such as new systems / capability. An Outcome is a **result** of change which affects real world behaviour/circumstances and may lead to one or more benefits.

**What is the difference between an Outcome and a Benefit?**

An Outcome is a result of change which affects real world behaviour/circumstances and may lead to one or more benefits. Outcomes are achieved as a result of the work done by projects and other activities creating outputs and new/enhanced organisational capability. Benefits are the measurable improvements resulting from, and enabled by, the outcomes.

The below is an example of what this could look like…

|  |  |
| --- | --- |
| **Type** | **Example** |
| Key Deliverable / Output | New SMS capability deployed for GP appointment reminders |
| Outcome (The Result) | More citizens are attending their appointments after receiving an SMS reminder |
| Benefit | Reduction of 20% of missed appointment leading increased. Customer satisfaction increased by 10%  The waiting time for new appointments is reduced by 1 day |

### Planning Levels

Within NHSD, there are currently 2 levels of planning which are to be applied consistently across the portfolio:

### Tier 1 – Level 1 - Outcomes

**Type of milestones:** Highest level, start/end, outcomes linked to commitments

**Use**: The planning detail that this level is based on outcomes. For example; NHS Long Term Plan Commitments / SoS Tech Vision Outcomes / Other Key Ministerial Commitments. These are long term, covering the full duration of programmes in the portfolio, and at the programme vision level.

### Tier 1 – Level 2 – Key Deliverables / Outputs

**Type of milestones:** Key programmes milestones/deliverables supporting / enabling delivery of Tier 1 Level 1

**Use**. Some examples are: Initiation, Closure, Transition to Service, Key Benefits Realised, Ministerial / GDS / HMT Approvals, Key Event / Deliverable / Target achieved.

### Lower levels

Lower planning tiers and levels have been defined in the NHSX draft planning framework. This is draft and subject to change; therefore, programmes are to continue planning lower levels as they do today. Any changes to planning levels will be communication by the Corporate Portfolio Management Office.

### Baselines & Governance

A milestone is baselined at the point in which it is approved by the most senior approval forum. This means that future changes to the scope, description and date of the baselined milestone would need to go through the change control process [link].

Only Tier 1 (Level 1 & 2) milestones are formally baselined.

To submit a new milestone or amend a milestone, please contact your CPMO Business Partner or alternatively email the CPMO [email] who will support you through this process and monitor the progress through to formal approval.

### Forecasts

Once a milestone is baselined, you will need to report whether this is on track each month in a monthly highlight report. The forecast date should be your best estimate of when the milestone is likely to be achieved. For milestones that have recently been baselined the forecast date is highly likely to match the baseline date.

A milestone forecast date should be regularly monitored and managed, always reflecting a future date, never remaining in the past.

### Slippage

The difference between when a milestone was originally baselined and when it was delivered, is monitored to help other programmes plan. This information provides us with key information (lessons learned) for similar programmes and reduces the impact of optimism bias.

**Hints and tips for writing a milestone…**

1. Keep it clear and understandable by a wide audience
2. Limit the use of acronyms
3. Make is specific to what is the achievement / target
4. Make it absolute – you should be able to say if a milestone has or has not been achieved. Avoid words like ‘in progress’