**
Ofgem Strategic Innovation Fund**

**Discovery End of Phase Report Template**

**Completion Information**

In accordance with the SIF Governance Document, the end of phase reporting is designed to facilitate learning and knowledge dissemination. It will also inform Ofgem’s decisions whether a Project satisfies the SIF Eligibility Criteria and whether a Project can move onto the Alpha Phase (subject to a successful Alpha Phase application).

The Project must submit an End of Phase Report to the Monitoring Officer by email or link to file sharing site. In addition, the Project must present findings at a public Show and Tell webinar scheduled for the end of May 2022.

In addition to concluding the Discovery Phase of SIF, should the Project be intending to progress to the Alpha Phase, this report will also form part of the application assessment process. The Show and Tell webinar will also be attended by the expert assessor panel responsible for Alpha Phase assessments.

The Monitoring Officer will review this End of Phase Report and assess the performance of the Project against the SIF Eligibility Criteria.

Your answer to each section can be up to 400 words. The Project may include diagrams to support responses but no hyperlinks unless we have explicitly requested. Up to 5 pages of appendices may be provided to support the report, including the finalised Project finance spreadsheet and risk register to support your responses to sections 4 & 6. Projects are encouraged to use appendices only where necessary, with the intention that the information provided in the End of Phase report focusses on the key elements of the Project, in a manner that is easily reviewed and accessible to a range of stakeholders.

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| **Project Number** | **Project Title** |
| **Date Written** | **Written By (Name, Job Title, Organisation)** |

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| **Section 1 -**  | **Discovery Phase – Project Summary** |
| Please provide a summary of the key findings from your Discovery Phase Project. Describe the innovative aspects of the work including any new findings or techniques. Please provide a short factual summary of the most significant outcomes of your work.  |
| You should describe:* How your Project has met the aims of the specific [SIF Innovation Challenge](https://www.ofgem.gov.uk/publications/strategic-innovation-fund-innovation-challenges).
* How your perception of the problem and opportunity evolved.
* Why the problem relates to energy network functions, and the potential role of energy networks to realise future opportunities. The innovative, novel and/ or risky aspects of the work, including any new findings or techniques.
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| **Section 2 -**  | **Discovery Phase – User Needs** |
| Please summarise your understanding of user needs including how you are translating these into requirements?  |
| You may want to describe:* How you have defined your scope boundaries and demonstrate why you believe you have got the scope of your project right.
* What would need to happen to make the user journey as a whole work as well as possible (in particular, you are able to talk about other services that are part of the same journey, and the opportunities and challenges involved in making changes to those services).
* How you have tested your own assumptions against the needs of your users
* How the approach you have taken will minimise the burden on your future users and avoid duplication of effort through user journeys.
* How you have considered the wider interactions of your outputs with the energy sector and other sectors. Show how you have looked at the wider user journeys your service might be a part of.
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| **Section 3 -**  | **Discovery Phase – Impacts and Benefits**  |
| Describe any leading indicators of potential net benefits to consumers as a result of the Project and justify any changes in proposed impacts since the Application stage. Please provide details of any changes that have been made to the Project and why these were necessary.  |
| You may want to describe:* If the project is still worth pursing and why is it cost effective to pursue.
* How the Project that progressed towards the benefits outlined in the discovery application.
* An indication on quantitative measurements for associated benefits could be related to the:
* the end consumer
* economic benefits resulting from the project to your users and any other parts of the supply chain, broader industry, and the UK economy, such as productivity increases and import substitution
* impact on government priorities and any associated benefits with this
* environmental impacts, either positive or negative
* any expected regional or wider energy supply resilience benefits
* impacts on consumers of the whole energy system (both individuals, and collectively), including those with any vulnerabilities or experiencing fuel poverty
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| **Section 4 -**  | **Discovery Phase – Risks, issues, and constraints**  |
| What constraints (i.e., technical, commercial, regulatory etc.) have you encountered during your Discovery Phase that may hinder your ability to progress the solution into Alpha? How do you propose to navigate these? Please provide a copy of the final updated Project risk register outlining the risks and issues you are currently aware of, including a likelihood and impact estimate, and mitigating actions.  |
| You may want to describe:* any actual or potential constraints in regulation, legislation, commercial contracts or legacy technology that affect the innovation you are developing
* any barriers for innovations to be delivered into business as usual
* how you will create an innovation that meets user needs while working within these constraints
* if you have identified constraints that can be removed over the short or long term, what your plan is for doing so.
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| **Section 5 -**  | **Discovery Phase - Working in the open** |
| How have you worked openly during the Discovery Phase, and engaged stakeholders in a transparent and constructive manner? What have you learnt from the approach you have taken? |
| You might want to describe:* ways in which you have talked publicly about the Project
* how you have invited challenge and external input of your approach to the Project
* how have you shared learning, to avoid duplication of work by others and accelerate industry progress on related initiatives
* how your team has been working in the open and have started building relationships with organisations and teams responsible for other parts of the user journey. These could include infrastructure/data owners, regulators, policy makers, investors, and others.
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| **Section 6 -**  | **Discovery Phase – Costs and value for money** |
| Please give a description of how funds were spent with reference to the original budget at Project kick-off and explain any significant variations. Explain how the Project has delivered value for money to consumers. Provide a copy of the final Project Finance spreadsheet. |
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| **Section 7 -**  | **Discovery Phase – Special Conditions** |
| If applicable, please describe how you have met the requirements of any Project specific conditions set out in the Project Direction.  |
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