Herefordshire Council

Title of report: MyAccount Capital Project

Decision maker: Cabinet member finance, corporate services and planning

Decision date: 19 July 2022

Report by: **Project manager**

Classification

Open

Decision type

Non-key

Wards affected

(All Wards);

Purpose

This report seeks approval to draw down on the allocation of capital funding to support the delivery of the MyAccount project.

Recommendation(s)

That:

a) Approval be given to draw down up to £443k of allocated capital funding to support the delivery of the MyAccount project

b) Delegated authority be given to the to the Service Director – Communities in consultation with the cabinet member for finance, corporate services and planning to take all operational decisions to implement the MyAccount project

Alternative options

1. Revenue funding only could be used for this project, however, this would mean that there would be insufficient funding to deliver aspects of the MyAccount and customer services

strategy project. The key areas not funded would include the resources necessary to carry out the review which is required to inform the customer services strategy and the development work needed to ensure that the MyAccount project delivers the requirements of that strategy.

Key considerations

2.   In July 2021 a business case was submitted using the council's capital business case process to request funding to enable a project to replace the Microsoft Dynamics Customer Relationship Management (CRM) system and related products, the funding was approved in February 2022.

3.   The MyAccount project submitted a business case to request capital funding in the sum of £443k in July 2021 which was approved in February 2022.

4.   The business case outlined the need to replace the existing Microsoft Dynamics software and related elements which make up the customer relationship management (CRM) system currently in use. Each of the components is either already no longer supported by the supplier or will cease to be supported by January 2023. Additionally there is a different solution which provides the website forms as a result these are created separately to the CRM system even though the content is intended to be the same.

5.   Even prior to the pandemic it was identified that the Microsoft Dynamics system didn't fully support the council's services, however, the pandemic highlighted the impact of the lack of flexibility and the inability to develop the system. This resulted in solutions, necessary for the interaction with residents for such things as food deliveries, being created outside of the CRM system.

6.   The project aims to provide a single gateway for residents to communicate with the council digitally and to support further transition to digital adoption in line with the council's engagement standards of digital first. The solution will :

   a. give the customer a consistent, quality experience regardless of the channel that they use to contact the council

   b. allow in-house development of workflows and forms which will easily respond to changing demands

   c. provides a combined view of the customer across the council's departments and services – a 'golden' record

   d. enable the analysis of trends and demand so that the council can be proactive in offering services and be more timely in their delivery.

7.   Since the business case was submitted in July 2021 revenue funding has been made available to the project to enable work to commence at the earliest time and for annual supplier costs to be paid.   This has allowed the necessary procurement work to already be undertaken and a contract awarded to Granicus for their govService solution along with a kiosk for the customer services site and a Councillor portal.

8.   The first phase of the project will deliver a replacement solution and allow the services currently provided by the customer services team, both by phone and in person in Blueschool House, to use the same solution as the forms provided to residents on the council's website. It will also deliver a portal for Councillors where calls can be logged by them and on behalf of residents, where both will be able to track progress on the call.

9. Whilst the system is a replacement solution in the first phase it will start to deliver benefits as soon as it goes live in the following ways:

    a. track and get updates on cases that have been logged with us

    b. have personal information, such as name and address, pre-filled on many of the online forms.

10. In parallel to this system change a customer services strategy review will be undertaken which will assist in defining subsequent phases of the MyAccount project.

11. Capital funding will be used to cover the implementation costs for the phases of the MyAccount project as detailed below:

Description	Amount	Fund
Granicus implementation costs year 1	£ 74,400.00	Capital
Project management	£ 62,979.30	Capital
IT project costs	£ 55,000.00	Capital
Phase 2 and Phase 3 development work	£ 50,000.00	Capital
Total	**£ 242,379.30**	

12. The total capital budget awarded for this project is £443k and as shown above at point 11, the current anticipated expenditure is £242.5k for the implementation of the govService solution including Hoople and Granicus cost.

Community impact

9. The current CRM system allows members of the public to log service requests with the customer services team by either completing a form on the council's website, visiting the team at Blueschool House or phoning them. Once the call is logged it is not possible for the person logging the call to access that call again and monitor its progress, this can only be done by calling or visiting the customer services team. The replacement system will allow users to review their logged calls and update them if there is new information or even close the call if it is no longer required. This change will improve the service the council are providing to members of the public.

10. The Talk Community is a key initiative of the council as outlined in the County Plan. This system will support Talk Community by providing information to staff and Councillors about calls that have been logged, providing better data to allow us to monitor trends and ensure that we are providing the right service at the right time. The system will also allow citizens the means of logging service requests online including payment for them, this will help to reduce the need to travel to one of the customer services centres, supporting the aim of reducing carbon emissions.

Environmental Impact

11. Whilst this is a decision on back office functions and will have minimal environmental impacts, consideration has been made to minimise waste and resource use in line with the council's Environmental Policy. It is expected that the solution will assist in eliminating some paper based and manual processes and result in less reliance on paper and printing, there is also a potential for travel reduction for our customers.

Equality duty

12.   Under section 149 of the Equality Act 2010, the 'general duty' on public authorities is set out as follows:

A public authority must, in the exercise of its functions, have due regard to the need to –

a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;

b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;

c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

13.   The public sector equality duty (specific duty) requires us to consider how we can positively contribute to the advancement of equality and good relations, and demonstrate that we are paying 'due regard' in our decision making in the design of policies and in the delivery of services. As this is a decision on back office functions, we do not believe that it will have an impact on our equality duty.

Resource implications

14.   The tables below outline the financial implications of this decision/project including costs for IT Services. The spend will be incurred in line with the council's contract procedure rules. The revenue budget and funding was covered in a previous decision, but the table below shows the expected costs of the project over 4 financial years and details the capital spend allocations.

Revenue and Capital cost of project	2022/23	2023/24	2024/25	2025/26	Total
Revenue	£000	£000	£000	£000	£000
Granicus licence and maintenance	114.5	99.5	99.5	99.5	413.0
Capital					
Granicus implementation costs	74.5				74.5
Project management	63.0				63.0
IT project costs	55.0				55.0
Phase 2 and 3 development work	50.0				50.0
Future development work		200.5			200.5
Total	**357.0**	**300.0**	**99.5**	**99.5**	**856.0**

Funding streams	2022/23	2023/24	2024/25	2025/26	Total
	£000	£000	£000	£000	£000
Revenue Base budget		78.5	78.5	78.5	235.5
Covid recovery grant	114.5				114.5
Software savings		21.0	21.0	21.0	63.0
Prudential Borrowing – proposed works	242.5				242.5
Prudential Borrowing – future works		200.5			200.5
Total	**357.0**	**300.0**	**99.5**	**99.5**	**856.0**

Revenue budget implications	2022/23	2023/24	2024/25	2025/26	Total
	£000	£000	£000	£000	£000
Licence and maintenance	0	0	0	0	0
Total	**0**	**0**	**0**	**0**	**0**

15. It is expected that once the customer services strategy review is complete, further work will be identified to that already anticipated in the proposed scope of phases 1, 2 and 3 (included in Appendix A). The remaining funds will be used to support additional deliverables that are anticipated to be identified in the review.

Legal implications

The purchase of the MyAccount Licence and costs to revenue for the implementation, maintenance and initial IT support and project management costs were subject to a separate decision taken on 31 March 2022

This decision relates to the draw down of capital for further support implementation costs, project management and IT project costs as well as Phase 2 and 3 of the project development work.

There are no further legal implications arising from this report.

Risk management

13. The following sets out the risks relating to the funding

Risk / opportunity	Mitigation
The customer services strategy does not require any changes to be made to the systems	**The funding allocated for future development would be allocated to other projects with approval at full council.**
Adoption by the services is lower than expected due to changes in Herefordshire Council's requirements.	The contract could be renegotiated with the supplier to reduce the elements included in the contract and reduce the cost. The customer services strategy project will assist in driving forward the use of the system. Any capital budget unspent as a result of the customer services strategy not requiring further work will be returned to be allocated to other projects with approval at full council.

d) This risk will be managed at project level and initially included in the project risk register. If required it will be handed over to the services and the relevant risk register at the point the project transitions to a live service.

Consultees

None

Appendices

Appendix 1 – Proposed Project Phasing

Background papers
None identified

Report Reviewers Used for appraising this report:

Governance	John Coleman	Date 24/05/2022
Finance	Karen Morris	Date 14/06/2022

Legal	Alice McAlpine	Date 23/06/2022
Communications	Luenne featherstone	Date 31/05/2022
Equality Duty	Carol Trachonitis	Date 24/05/2022
Procurement	Lee Robertson	Date 24/05/2022
Risk	Jo Needs	Date 24/06/2022

Approved by	Hilary Hall	Date 07/07/2022

Please include a glossary of terms, abbreviations and acronyms used in this report.