BROMSGROVE DISTRICT COUNCIL

CABINET

5th NOVEMBER 2008

SPATIAL PROJECT - SECOND PHASE

Responsible Portfolio Holder	Cllr Del Booth
Responsible Head of Service	Deb Poole
	Head of E-Government & Customer Services
Key Decision	

1.   SUMMARY

1.1   The Spatial Project is a modernisation programme aimed at providing staff with the systems, processes and tools to deliver improved services to BDC customers. The project business case separated the delivery of these systems into two phases. Phase one was known as FM1 and phase two as FM2.
Phase one has been underway since the end of 2006 and is due for completion at the end of October 2008.
Phase two was proposed to start after completion of the first phase and focused on delivering complex system integration. A more detailed analysis of the project phases is available within the Spatial Project Business case.

1.2   In July 2008 system suppliers were invited to tender for the provision of a solution for phase two of the project. Two suppliers, Anite Systems and Hewlett Packard, submitted proposals and carried out presentations to the Spatial Project Board. The tender exercise was based on finding a possible solution for the original scope of phase two of the Spatial project.
It was agreed that a report would be taken to Cabinet to provide additional detail once the costs were known and the first phase neared completion. Details of the proposed costs for these solutions are included in this report at 4.2.

1.3   As a result of the systems presentations mentioned in 1.2 above, it became clear that the scope of the second phase of the Spatial project would need to be redefined and the potential costs for this element reviewed.

1.4   The revised scope for phase two has been costed at significantly less than the original £1.2 million previously approved by Members for this work. Consequently, the revised scope would result in a return to the Capital budget of approximately £1m.

2.   RECOMMENDATION

2.1   It is recommended that:

2.1.1 members agree to the release of £101,700 of Capital monies from the previously approved project budget.

2.1.1 Members agree to the revised scope for phase two including the purchase and implementation of 'SmartPoint' software as detailed in this report.

2.1.2 The implementation of this software be scheduled to follow the conclusion of phase one of the Spatial Project, which is due for completion at the end of October 2008. This will enable the knowledge and experience of key Spatial phase one resources to be utilised during the second phase.

3. BACKGROUND

3.1 In 2005 a wide ranging investigation was carried out into the efficiency and effectiveness of BDC's business processes. The findings of this investigation were detailed in the Spatial Project Business Case which was presented to Members in 2006 for approval. The business case proposed two phases of implementation:

Phase One (FM1) - The first phase proposed the transformation of service delivery along with the introduction of mobile working and remote working. The main key deliverables of this phase of the project were covered under three headings:

- Business Process Mapping
- Corporate Electronic Document Management
- New Integrated Business Applications (CAPS/IDOX)

The detailed breakdown of applications and system developments contained within these three key deliverables is listed below:

- Corporate Gazetteer
- Gazetteer Management system (LLPG – Local Land and Property Gazetteer)
- Environmental Health system
- Estate/Asset Management module
- Building Control module
- Development Control module
- Electoral Management system
- Housing module
- Licensing module
- Land Charges module
- Document Management system
- Business Process Mapping
- Mobile technologies
- Web based access to mapping data

Phase Two (FM2) - The second phase of the project proposed the delivery of complex, deep integration to existing core back office applications eg: Agresso, Customer Relationship Management system (CRM) etc.

4. SPATIAL PHASE TWO – REVISED APPROACH

4.1 During the past two years since Members approved the Spatial Project Business Case, BDC has undergone a considerable amount of change. Many of these changes have, or are likely to, impact on the original Spatial phase two scope. Some of these key changes include:

- The Customer Relationship Management (CRM) system, known as 'E-Shop' is going to be upgraded to 'OneServe' by the Worcestershire Hub partnership within the next twelve months. This would lead to any existing two way integration between the CRM and back office systems such as Benefits, having to be re-written by suppliers at high cost.

- The Customer Services Centre has various potential directions for future business delivery including a shared services model and, until it is clear how this will progress, making a large capital investment at this time carries a high risk of being redundant spend.

- The recent appointment of a shared Chief Executive between BDC and Redditch Borough Council (RBC) could result in the delivery of more shared services between these organisations. The requirement to change or merge existing back office systems would make any complex integration project and spend redundant as other non BDC systems came online.

4.2 Due to the above items and the need to ensure their associated risks were priced into the original second phase, the two potential suppliers for FM2 produced the following costs based on the original scope.

FM2 – Original Scope	Anite	Hewlett Packard
Implementation	£800,000	£2,600,000
Support	£500,000	£2,400,000
MDA Services	£200,000	£200,000
Risk	£200,000	£400,000
TOTAL	**£1,700,000**	**£5,600,000**

4.3 The high costs quoted above and the potential organisational changes have resulted in a reworking of the scope for phase two. The new scope will ensure that the solution provides:

- A simplified technical solution that can be moved easily from different versions of the CRM system.

- Limited integration whilst ensuring that double entry of information is avoided where possible.
- key business benefits whilst being flexible enough to accommodate the changes highlighted in this report

4.4 During the evaluation of potential suppliers for the original FM2, one company, SmartPoint, demonstrated clear compliance with these constraints and while they initially formed part of the Anite proposal, their solution can be implemented independently.

5. <u>SMARTPOINT SOFTWARE</u>

5.1 SmartPoint software provides a clear interface for the delivery of information from back office systems to Customer Service Advisors (CSAs) via an online 'dashboard' screen. Example dashboard elements that Bromsgrove District Council might use include:

- Council Tax Benefit Claim Status
- Housing Benefit Claim Status
- History of Benefit Claim Payments
- Planning Application Status
- Non Payment Alerts
- Refuse and Recycling days
- Licensing Application Status

5.2 The software utilises thin integration between front and back office systems to present relevant information on one screen. It automatically provides CSA's with highly relevant information from diverse data sources eg: email, file systems, external web sites etc.
It does not however, provide full integration as information flows from the back office systems into the 'dashboard'. Complex sets of information cannot then be updated and sent back in the other direction. Although, SmartPoint have indicated that some limited two way exchanges of information may be possible.

5.3 SmartPoint has already been installed at Wychavon District Council Customer Service Centre and is being used to enhance the flow of information to CSAs using the Worcestershire Hub's E-Shop CRM application. More details of the benefits of using this software are described in Appendix A.

6. <u>FINANCIAL IMPLICATIONS</u>

6.1 The original Spatial Project budget was approved by Members in 2006. A sum of £1.2m was allocated from this budget for the implementation of phase two (FM2)

6.2 The redefined scope for phase two has now been costed. Details of this cost are included in the table below:

	SmartPoint	Price
Year 1	SmartPoint software inc 10% discount *	£20,000
	Hardware	£5,000
	Support	£2,500
	SmartPoint Professional Services	£38,000
	Project Management	£31,200
	Integration	£5000
	Total	**£101,700**
Ongoing	Support	£2,500
	Total	**£2,500**

*NB: These prices include a discount as negotiated for members of the Worcestershire Hub Partnership.

6.3 As budgetary provision to cover this aspect of the project has already been approved a release of £101,700 will be required into the Capital project budget.

7. LEGAL IMPLICATIONS

7.1 There are no legal implications.

8. COUNCIL OBJECTIVES

8.1 This proposal supports the Council's objective of Improvement.

9. RISK MANAGEMENT

9.1 The main risks associated with the details included in this report are:

- The original scope would be significantly over budget

    Risk Register: ICT Services
    Key Objective Ref No: 1
    Key Objective: Deliver the Spatial project on time and within budget and to realise the benefits of the project as outlined in the business case

10. CUSTOMER IMPLICATIONS

10.1 It is envisaged that customers would see an improved level of resolution of enquiries at the CSC. It is also anticipated that increased access to whole customer information would present opportunities to be proactive when dealing with enquiries.

11. EQUALITIES AND DIVERSITY IMPLICATIONS

11.1 There are no Equality & Diversity implications.

12.   VALUE FOR MONEY IMPLICATIONS

12.1 The original Spatial Project Business Case was agreed by Members in 2006 but this report defines a possible alternative scope for phase two of the project whilst delivering similar outcomes but at a greatly reduced cost.

13.   OTHER IMPLICATIONS

Procurement Issues - None
Personnel Implications - None
Governance/Performance Management - None
Community Safety including Section 17 of Crime and Disorder Act 1998 - None
Policy - None
Environmental - None

14.   OTHERS CONSULTED ON THE REPORT

Portfolio Holder	Yes
Chief Executive	Yes via CMT
Executive Director - Partnerships and Projects	Yes via CMT
Executive Director – Services	Yes via CMT
Assistant Chief Executive	Yes via CMT
Head of Service	Yes via CMT
Head of Financial Services	Yes via
Head of Legal, Equalities & Democratic Services	Yes via CMT
Head of Organisational Development & HR	Yes via CMT
Corporate Procurement Team	No

15.   WARDS AFFECTED

All wards

16.   APPENDICES

Appendix A - SmartPoint Benefits

17.   BACKGROUND PAPERS

Spatial Project Business Case

CONTACT OFFICER

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SmartPoint Benefits

Intuitive to use
SmartPoint leverages your existing CRM application, processes and content sources, without requiring large scale changes to those systems. SmartPoint enhances and optimises the way a member of your customer service team works, by driving relevant information to them, without having to consciously request it.

Quick and easy to install
SmartPoint's unique technology means that no reprogramming of Onyx E-Shop is required to monitor user activity and deliver information in context. Dashboards can be added and amended quickly and easily after just a few days of training at the time of implementation. In addition, adjusting the dashboards to work alongside Onyx OneServe is a quick and painless exercise. SmartPoint is already in use alongside Onyx OneServe at **Medway Council**.

Affordable
Using SmartPoint to make the most of your existing investment in information technology is fast, cost effective and low risk. SmartPoint enables your authority to increase the ROI of the current information infrastructure by enhancing the users working environment and integrating information from many sources quickly and efficiently.

Agile and Open
SmartPoint is able to adapt as your requirements change. By combining SmartPoint with Microsoft's InfoPath for eForms or SharePoint for document storage, unstructured information may be gathered and retrieved as required.

SmartPoint Summary

SmartPoint delivers information from back office systems to Customer Service Advisors (CSAs), at the moment it is required, in a context sensitive dashboard.

It's innovative ability to connect people with relevant information, simply and easily, puts CSAs firmly in control of their information environment. It automatically provides them with highly relevant information, in real-time, from diverse sources, such as application data stores, email, file systems, and external web sites.

SmartPoint is currently being used to enhance the flow of information to CSAs using the Worcestershire Hub's Onyx E-Shop CRM application. SmartPoint is already performing this role at **Wychavon District Council**.

Example dashboard parts for Bromsgrove District Council might include:

- Council Tax Benefit Claim Status
- Housing Benefit Claim Status
- History of Benefit Claim Payments
- Planning Application Status
- Non Payment Alerts
- Magistrate Summons'
- Skip Permits in Local Area
- Refuse and Recycling days
- Licensing Application Status

This information comes directly from back office application data sources via a Java Data Base (JDBC) or Open Data Base (ODBC) connection. Web Services may be used to retrieve the information where adaptors are available and currently implemented.

Professional Services - Highlevel Project Plan

The following plan represents a phased model for implementation ensuring regular measurement of progress against initial objectives. This high level plan covers work carried out by SmartPoint employees only.

Phase 1 – project scoping exercise

- Analysis of processes within the Customer Service Centre (CSC) to identify where SmartPoint can improve the availability of information
- Analysis of back end data sources, availability of data connections and location of data schemas to ensure accurate estimates for subsequent phases.

Phase 2 – installation, training and dashboard requirements

- Installation of SmartPoint within the Onyx E-Shop environment
- Installation of IBM Websphere Express
- Workshops to determine the dashboard Specification for each of the defined 'View' processes as provided in document 'Bromsgrove District Council NLIS/LAMP Project, Customer Integration System (FM2), Requirements Summary' dated 23 May 2008.
- Training of Bromsgrove DC personnel on set up and use of SmartPoint and to assist in constructing a test dashboard

Ref	Department	Process
01	Revs & Bens	Appeal Enquiry
02	Revs & Bens	Council Tax Benefit Claim Query
03	Revs & Bens	Housing Benefit Claim Query
04	Revs & Bens	Backdating benefit payments
05	Revs & Bens	Outcome/status of Discretionary Housing Payment application
06	Revs & Bens	Status of Financial (payments, Overpayment)
07	Revs & Bens	Outcome/status of Pre-Tenancy Determination
08	DC	Planning Application query
09	DC	Status of Planning Appeal
10	DC	Status of Planning Enforcement
11	Licensing	Licensing application Query
12	BC	BC Application Query
13	EH	Update on EH incident/Service Request

Phase 3 – provision of dashboard parts

- Construct a single SQL query to provide a single dashboard part in support of each of the View processes
- Construct a single dashboard for each of the View processes

Phase 4 – introduction of Onyx OneServe

- Install SmartPoint within Onyx OneServe environment and re-establish dashboard parts and data connections
- Test delivery of information in the new environment