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Civica CX (Housing): system interfaces and integration

Date: June 2023

Report of: Chief Officer Housing and Chief Digital & Information Officer

Report to: Corporate Governance and Audit Committee (CGAC)

Will the decision be open for call in?   ☐ Yes ☒ No

Does the report contain confidential or exempt information?   ☐ Yes ☒ No

Brief summary

> This paper provides an update relating to the Housing ICT System (Civica CX) and how it integrates with other systems. This includes an update on the agreed workarounds and temporary arrangements that have been implemented, and what work is ongoing to continually improve the systems and integration.

Recommendations

a) Members of Corporate Governance and Audit Committee (CGAC) are recommended to:

    i.   note the contents of this report;

    ii. agree that following the successful upgrade of Civica CX (programmed for Autumn 2023) and the conclusion of the IDS Integration workstream, that a further report is provided to the Committee if any of the issues are still outstanding; and

    iii. Note the ongoing Internal Audit work, the outcomes from which will be reported in the relevant Internal Audit Update Report.

What is this report about?

1 This is an information paper, providing Members with a response to queries raised at the November 2022 meeting of Corporate Governance and Audit Committee (CGAC) concerning issues with the Housing ICT System (Civica CX) and how it integrates with systems to allow payments.

2 The issues (as raised by members of CGAC) that are being responded to in this paper are as follows:
   a) More information is needed related to reported problems in terms of putting information into Civica CX and making payments;
   b) More detail needed on what issues there have been or are in terms of making sure Civica CX connects to 'sub-systems' and allowing payments to be made;
   c) Further understanding of anything that is causing additional infrastructure requirements; and
   d) details of related issues that were presented when Civica CX was first introduced in August 2021, along with updates as to how these are being or have been resolved.

What impact will this proposal have?

3 There are no new proposals put forward in this paper.

4 This paper provides the committee with an update on issues that were present when the Housing ICT system (Civica CX), went live in 2021, along with assurance that arrangements, processes and improvements are being implemented to ensure that issues are being addressed.

How does this proposal impact the three pillars of the Best City Ambition?

⊠ Health and Wellbeing   ⊠ Inclusive Growth   ⊠ Zero Carbon

5 The Best City Ambition pillars are underpinned by having robust ICT Systems in place. This includes:
   • appropriate Housing Management systems to promote effective services to our tenants (as part of the Health and Wellbeing pillar),
   • allowing our sub-contractors and internal service providers to be paid for an effective service delivered (Inclusive Growth Pillar).
   • The system was also intended to support the Zero Carbon pillar by helping to reduce the carbon footprint and help increase efficiency with a more accessible web-based system.

6 The implementation of Civica CX underpins the key housing priorities and supports and follows the council's policies and ambitions relating to digital technology and being an efficient and enterprising organisation.

What consultation and engagement has taken place?

Wards affected: n/a		
Have ward members been consulted?	☐ Yes	⊠ No

7 There is ongoing joint working with key internal stakeholders such as Housing, Integrated Digital Services (IDS), Finance and the Contact Centre, along with Housing Sub-Contractors to ensure the benefits from the system are maximised. System users (Housing, Finance and Contact Centre) staff continue to be supported pre and post implementation of CX through training, guidance and other forums.

8 The ongoing improvements to the system are overseen by the Housing ICT Project Board. The Board was Chaired by the Director of Resources & Housing until Housing moved to Communities, Housing and Environment (C, H & E) in April 2022. It is now Chaired by the Director of C, H & E and has been attended consistently by the external supplier, Civica, and colleagues from Finance, Housing, IDS and the Contact Centre.

9 An internal audit of Civica CX is currently in progress. This aims to review any workarounds implemented to address known issues, assess any processes that have been put in place to identify, track and prioritise issues that have arisen since implementation, and look at what action has been taken to address, mitigate and report on these.

What are the resource implications?

10 Due to Civica CX and some Housing Sub-contractor systems not being compatible, it has not yet been possible to deliver full integration and therefore a number of manual workarounds have been implemented, meaning more human resource time is spent on these processes.

What are the key risks and how are they being managed?

11 There is a risk around the integrity of the source data that feeds into the core FMS. This is largely attributed to the fact that some data quality issues were migrated from the previous Housing ICT system, Orchard. This is being managed and mitigated by various data quality and cleansing exercises being undertaken (by Housing and IDS) since the system went live, along with rolling out continued training and guidance to staff to prevent further discrepancies and improve data quality.

12 The Housing ICT System is not fully integrated with those of our contractors (repairs and maintenance) resulting in a risk of late or missed payments. This is being mitigated by colleagues (Housing and IDS) working with contractors to complete the required integration and make any required manual payments.

What are the legal implications?

13 If any payments are made late to contractors, there is a risk that the council is breaching the terms of contract with these suppliers. This is being managed and mitigated through regular progress / relationship management meetings, along with the ongoing work to carry out any manual processes and work on improving system integration.

Options, timescales and measuring success

What other options were considered?

14 The Housing ICT Project Board made the decision to go live with Civica CX in Summer 2021. The alternative route of continuing to use the previous systems (Orchard) was discounted due to be it being outdated and no longer compliant with new security standards.

15 The decision to go live was made by the Board in the knowledge and acceptance of the fact that there were several unresolved issues still outstanding. All parties committed to implement workarounds, mitigation measures and plans to resolve and address these known issues.

16 The table below summarises the issues related to transferring of information, making payments and connecting to our own and contractors' sub-systems, together with the agreed workarounds and temporary arrangements that were implemented.

Issue (Related to inputting of information, making payments and connecting to our own and contractors' sub-systems)	Workarounds implemented
Not integrated with Leeds Building Services (LBS) ICT systems	Jobs are transferred through a partially manual process and there is a continued use of a file transfer solution High-level payments made – detailed jobs are still to be processed, with a higher level of manual intervention
Not integrated with Mears ICT Systems	Used non-integrated functions via the Contractor Access Portal. Implemented manual workarounds to apply charges, apply variations / cancellations
Not integrated with PH Jones ICT Systems	Used non-integrated functions via the Contractor Access Portal. Implemented manual workarounds to apply charges, apply variations / cancellations
Not integrated with Liberty ICT Systems	Used non-integrated functions via the Contractor Access Portal.

	Implemented manual workarounds to apply charges, apply variations / cancellations
No functionality to produce VAT Compliant Self-Billing Invoices and unable to automatically produce in FMS from Cx reports	Additional resource pressures on finance teams to implement and administer manual workarounds to both invoices and VAT return

How will success be measured?

17 Details of work to date and on-going work to address these issues is summarised below. The success is measured through the resolution of all issues below.

Issue (Related to inputting of information, making payments and connecting to our own and contractors' sub-systems)	**Progress Update**	
	RESOLVED: Now able to	OUTSTANDING: Unable to automatically:
Not integrated with Leeds Building Services (LBS) ICT systems	• **Raise orders** • **Job Updates** - Went live June 2022 - Working through backlog • **Apply Charges to jobs** - Workaround in place since August 2022 to allow LBS to charge for jobs - Working through backlog • **Process Payments** - Functionality available but variations are recorded after work completed.	• **Cancel orders** - Will be resolved in the Upgrade expected spring 2023 • Manual workaround with Civica to cancel batches of orders to keep system up to date • **Raise Variations real time** - Ongoing development needed in both Connect and Cx • Difficult to **forecast spend** due to backlog in variations and cancelled orders still in system • **Update Appointments** - No functionality in Cx

Not integrated with Mears ICT Systems	• Raise orders
	• Update job
	• Raise Variations
	• Process Payments
	• **Separate BITMO (Belle Isle Tenant Management Organisation) and Housing Contracts as two distinct contractors**
		• **Cancel orders**
		  • This will be resolved in the Upgrade expected spring 2023
		  • Manual workaround with Civica to cancel batches of orders to keep system up to date
		• **Get appointment data back**
		• **Variation Processing Issues**
		  • Integration issue regarding variations being applied multiple times in an order is being investigated by the IDS Integration work stream

Not integrated with PH Jones ICT Systems	• **Raise orders**
	• **Update jobs**
	• **Process Payments**
		• **Cancel orders**
		  • This will be resolved in the upgrade expected autumn 2023
		  • Manual workaround with Civica to cancel batches of orders to keep system up to date
		• **Backlog of any orders** prior to Update job solution need updating via loader.

Not integrated with Liberty ICT Systems	• Raise orders • Update Jobs • Process Payments • Liberty have been provided with a report of all outstanding orders to enable them to process the backlog.	• none
No functionality to produce VAT Compliant Self-Billing Invoices and unable to automatically produce in FMS from Cx reports	• Manually produce VAT compliant self-billing invoices	• Development of automated self-billing invoice from CX reporting currently in progress with IDS

What is the timetable and who will be responsible for implementation?

18 Testing has commenced by Leeds City Council (IDS, Housing and Contact Centre) on an upgraded version of the Civica CX system. Testing is programmed to conclude in time for the system to be upgraded by Autumn 2023. The upgrade is a joint responsibility between the supplier (Civica) and the council and is being monitored via the Housing ICT Project Board.

19 An integration workstream (joint Housing and IDS resources) continues to work with Housing contractors and LBS as an internal service provider, to progress integration with their respective ICT Systems. Many of the existing issues will be improved by the above CX Upgrade and continue to be supported by the workarounds currently in place.

20 An internal audit is being carried out to review any workarounds implemented to address known issues, assess any processes that have been put in place to identify, track and prioritise issues that have arisen since implementation, and look at what action has been taken to address, mitigate and report on these. It is anticipated that any unresolved issues will be addressed by this audit, the draft audit report is expected mid July 2023.

Appendices

• none

Background papers

Council and democracy (leeds.gov.uk)

(Public Pack) Agenda Document for Executive Board, 10/02/2016 13:00 (leeds.gov.uk)

• (Public Pack) Agenda Document for Corporate Governance and Audit Committee, 28/11/2022 10:00 (leeds.gov.uk)