

Core Business Transformation Programme – Progress Update

Date: 18th September 2024

Report of: Chief Officer, Financial Services

Report to: Executive Board

Will the decision be open for call in? Yes

Does the report contain confidential or exempt information? No

Brief Summary

This report (and attached appendices) provide Executive Board with an update on progress of the Core Business Transformation Programme. The update aims to provide assurance that programme delivery framework, programme and workstream management and governance arrangements are up to date, fit for purpose, operating effectively and complied with to ensure successful delivery of the programme.

Recommendations

- a) Executive Board are requested to note the details provided in the progress report at **Appendix I** and note that a further update will be provided in 6 months.

1. What is this report about?

- 1.1 This report provides Executive Board with an update on the progress of the Core Business Transformation Programme; a programme aimed at transforming and modernising 'back office' services. The programme, although predominantly a 'business transformation' programme, is underpinned by a technology refresh; replacing essential, business-critical corporate systems (i.e. Finance, HR, Payroll, Procurement) that have reached 'end-of-life' in terms of contractual arrangements, support and maintenance.
- 1.2 Current systems sit on out-of-date technology platforms that give rise to time consuming and 'clunky' processes that are not fit for modern or cost-effective ways of working e.g. Cloud-hosted, interoperable, mobile or self-service enabled. The technology refresh introduces new platforms that will enable the delivery of ongoing continuous improvement and transformation well beyond the initial implementation period. The programme aims to make it easier to 'do business' and help alleviate growing pressures on workloads and front-line service delivery through use of modern, integrated technology e.g. digital workflows across integrated modules, process automation, self-service, information dashboards and self-service intelligence tools across core business functions.
- 1.3 The progress update (**Appendix I**) demonstrates that:

- (a) the technology implementations pertaining to each workstream are being effectively managed to achieve the outcomes articulated in the CBT business case(s). That risks and issues are being effectively managed with a view to achieving successful implementation within agreed timescales and budget.
- (b) design decisions are in accordance with the constitution, standard best practice guidance and advice provided by experienced external Consultants engaged at various stages throughout the programme to support corporate transformation.
- (c) delivery of the Core Business Transformation Programme aligns with statutory and corporate requirements in relation to programme/project methodology and decision making.
- (d) design decisions are aligned with the aims and ambitions outlined in the CBT Business Cases in particular “adopt not adapt” principles.
- (e) that all options and recommendations are informed using robust sources of intelligence including internal subject matter and technical experts such as - experienced external Consultants, external Professional Advisory Services, internal services such as Procurement, Legal, IDS Services as well as other Councils sharing lessons learnt.

2. What impact will this proposal have?

- 2.1 The report provides assurance by way of an update of the effectiveness of the arrangements for successful procurement, design and implementation of the new core business (Finance, HR, Payroll, Procurement) technologies and achievement of the aims and objectives outlined in the business case for the Core Business Transformation Programme (see decision [D55730](#)).
- 2.2 An Equality Impact Assessment (EIA) was undertaken at the outset of the programme (December 2022) to understand the impact of the programme on Equality, Diversity, Cohesion and Integration and an action plan subsequently developed. The EIA is regularly reviewed and updated, most recently on 29th August 2024, this version is attached at **Appendix II**. Updates on progress of the actions outlined in the plan are provided to the CBT Programme Board on a monthly basis.

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

Health and Wellbeing Inclusive Growth Zero Carbon

- 3.1 Core Business Transformation is an enabling programme that underpins successful delivery of the ambitions outlined in the corporate Organisational Plan, Financial Strategy, People Strategy and Procurement Strategy and the LGA Procure to Pay Action Plan. Although primarily a business change programme, successful design and implementation of new, modern and fit for purpose technology is key to achieving the ambitions for optimum compliant, efficient and cost-effective ways of working in relation to ‘core business functions’, all of which supports the Council in achieving its Best City ambition.
- 3.2 The health and wellbeing of the Council workforce and that of our partners will be improved by having access to the right tools to undertake core business processes easily and efficiently and in-part ease pressures of increasing workloads.
- 3.3 The new finance and procurement systems will be used by those employees who have responsibility for financial management activities, budget monitoring/reporting, purchasing, payment processing, income collection, procurement, contract and supplier management. The new HR/payroll system will be used by all employees either in a managerial capacity or an employee self-serve capacity, making it quicker and easier to undertake people management processes and access and maintain personal/work related information (including more informative, interactive, on-line payslips).
- 3.4 The new HR/payroll solution will also provide non-office based, front-line staff with direct access to on-line information (such as corporate messages, policy information) that has previously been difficult to access, reducing long standing barriers to effective and timely communication.

- 3.5 Providing the whole workforce with modern, digital tools, including the current 'off-line' staff, will provide the opportunity for all staff to become more digitally aware and digitally able. Upskilling the Council's workforce to include the ability to work with digital processes (a requirement which is now wide-spread in most modern organisations both at work and at home), will contribute to the inclusive growth ambition by enabling staff to develop the skills required for modern ways of working and modern ways of living, opening up career opportunities that may not have been previously available.
- 3.6 The Council's zero carbon ambitions are supported through the introduction of more modern ways of working, eliminating old-fashioned paper-based processes and harnessing digital, on-line, flexible ways of working that contribute, in part, to the reduction in home-to-office travel.

4. What consultation and engagement has taken place?

Wards affected: N/A		
Have ward members been consulted?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No

- 4.1 Stakeholder engagement has been a key part of the programme and is regularly undertaken with the Core Business Transformation Board (which includes senior representation from Directorates); IDS, Financial Services, HR, PACS Leadership Teams; Information Governance, Internal Audit.
- 4.2 Engagement activities also include Member updates and oversight including the Deputy Leader/Executive Member for Resources, Executive Board and Corporate Governance & Audit Committee.
- 4.3 Each workstream within the programme has its own Communications & Engagement plan, which incorporates activities such as newsletters, surveys, briefings, change workshops and demonstrations to service management teams, trade unions, staff network groups – providing the opportunity to collate feedback and views, which have helped inform design decisions, training development and roll-out plans. This will continue to be the case as we progress to implementation. Training plans are being developed to include on-line and face to face training solutions.

5. What are the resource implications?

- 5.1 All resource requirements were outlined in the CBT business cases for Finance, HR/Payroll and Procurement approved on 19th October 2022, 8th February 2023, 27th July 2024 respectively.

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

- 6.1 The key risks relating to the programme are:

Risk	Details	Mitigations
Resourcing	There is a risk that the programme team will not have access to the required level of skilled and knowledgeable resources to successfully deliver the programme due to pressures of business-as-usual work in services. The current financial challenges are causing workforce pressures resulting in a lack of capacity for staff to contribute time to projects and improvement work over and above day to day demands. There is a risk that the costs will exceed the budget provision.	Establish dedicated 'core' programme team. Release subject matter experts to work on the programme full-time, and temporarily back fill roles. Include contingency in budget, ensure rigorous budget monitoring and supplier contract management. Utilise IDS Augmentation Partner to supplement technical resources.
Timeline	There is a risk that the programme may not achieve the desired timelines due to unknown/unexpected requirements and the level of complexity involved in implementing new finance and payroll systems	Utilise experienced implementation Consultants to manage the project using standard project management methodologies and tools. Regular review of timelines, stages and plans
Scope	There is a risk of scope creep due to complexity and interdependencies	Document and agree scope at the outset. Utilisation of design governance and change control process
Quality	There is a risk that the new solutions do not meet business needs	Utilise experienced implementation Consultants – use LCC subject matter experts in design process. Mutually agree deliverables and business sign-off on blueprint. Appoint

		dedicated Test Manager, rigorous test management plans, user acceptance testing plans, defect and options and risk analysis to be discussed at Board prior go-live
Business Change	There is a risk that the required business change is not achieved, and benefits are not realised and that staff are not adequately trained to use new systems	Utilise dedicated 'change' resources to identify change impacts and work with services to achieve required change – develop champions network, design and deliver change and communication activities and plans
Information Governance	There is a risk of inaccurate or out of date data being migrated to new systems,	IG Officer assigned to work with the project team to provide advice and oversight. Recruit a dedicated data migration/integration manager onto the team to work alongside experienced consultants. Undertake multiple rounds of data migration rehearsals, undertake data cleansing exercises
Delays with dependencies	There is a risk of delays in dependent projects that adversely impact the programme timelines	Identify dependant projects and track progress reporting issues to Board.

6.2 A programme level risk register is actively managed by the Programme Manager. Each implementation project has its own risk register that is managed by the implementation partner and workstream lead. All risk registers are discussed and monitored at Programme Board. Internal Audit are also providing real time assurance of the programme. The Head of Finance – Internal Audit attends CBT Board and undertakes quarterly assurance reviews. Reports are presented and discussed at Board on a quarterly basis. Reporting to date demonstrates that arrangements are fit for purpose and that no areas have been identified as less than acceptable. Details of the assurances provided are included in the Internal Audit update reports to the committee. Key risks feed through to broader directorate and corporate risks, including those informed by learning lessons from other councils major IT projects.

7. What are the legal implications?

7.1 Guidance and advice has been obtained from the Councils' Corporate Governance Team, Programme Management Office and Procurement & Commercial Legal Team (PACS) and at all stages of the decision-making process to ensure that the programme meets the statutory and organisational requirements in relation to programme delivery.

8. Options, timescales and measuring success

8.1 What other options were considered?

8.2 All options were considered at the business case stage and outlined in the business cases approved on 19th October 2022 (Finance), 8th February 2023 (HR/Payroll) and 4th July 2024 (Procure to Pay).

8.3 How will success be measured?

8.4 Success will be measured through the successful implementation of the new solutions along with achievement of the aims and ambitions outlined in the CBT business cases and the realisation of the benefits outlined in the benefits trackers.

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

9.1 The programme delivery framework is already in place and will remain so until the successful delivery of the aims and ambitions outlined in the CBT business cases. The officer responsible for implementation is the Core Business Transformation Programme Manager.

10. Appendices

- **Appendix I** - Overview of the CBT Design & Delivery Framework
- **Appendix II** – Equality Impact Assessment (reviewed August 2024)

11. Background Papers

None

Core Business Transformation Programme - Progress Update

1. Background

1.1 The CBT Programme was established in 2019/20, with a view to transforming and modernising 'back office' services. The programme, although predominantly a 'business transformation' programme, is underpinned by a technology refresh, replacing essential corporate systems (i.e. Finance, HR, Payroll, Procurement) that have reached 'end-of-life' in terms of contract, support and maintenance. Current systems are hosted 'on-premise' and sit on technology platforms considered out of date and not fit for modern or efficient ways of working e.g. Cloud, interoperable, mobile or self-service enabled. The technology refresh introduces new platforms that will enable the delivery of ongoing continuous improvement and transformation beyond the initial implementation period, essentially making it easier to 'do business'

1.2 Functions in scope include:

- Finance
- Core HR (Employee Record) & Payroll
- Recruitment and Onboarding
- Learning, Development and Performance
- Health & Safety inc Occupational Health
- Procurement (including Contract Management)

1.3 Programme governance arrangements were established at the outset with the creation of a dedicated Programme Team reporting to the Core Business Transformation Board which meets monthly and is chaired by Victoria Bradshaw, Chief Finance Officer, with Andy Dodman Chief HR Officer as Deputy Chair, alongside other senior key stakeholders from Strategy & Resources and Council Directorates:

Board Members:

- Chief HR Officer (Deputy Chair) Senior Stakeholder
- Interim Chief IDS Officer, Senior Stakeholder and Senior Supplier
- Head of PACS, Senior Stakeholder
- Deputy Chief Officer HR & Shared Services, Senior Stakeholder
- Chief Officer Resources, Transformation & Strategy, Children & Families, Senior User
- Chief Officer Resources & Strategy, Adult Social Care, Senior User
- Chief Officer Welfare, Community Hubs & Business Support, Communities, Housing & Environment) Senior User
- Chief Officer Operations & Active Leeds, City Development, Senior User
- Head of Commercial, City Development, Senior User
- Head of Information Management, Senior Stakeholder
- Head of Finance – Internal Audi (for programme assurance, advisory and guidance purposes only)

1.4 The Board meets monthly and operate with following Terms of Reference (summarised):

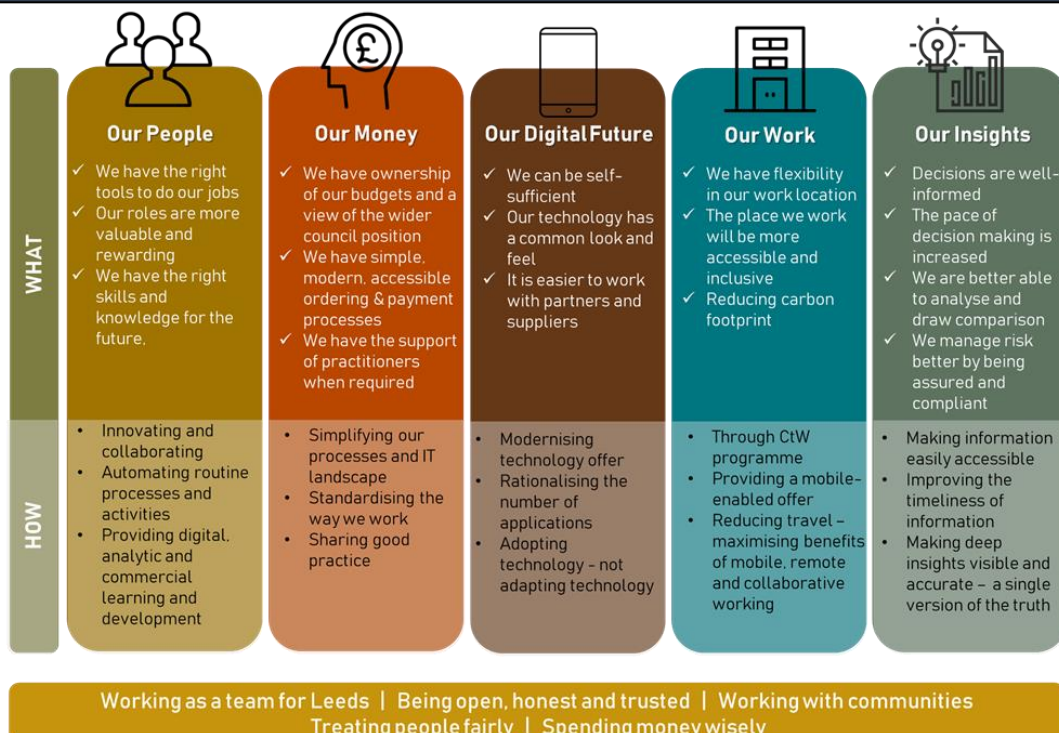
- Ensure the Programme meets its Vision, Strategic Objectives / Outcomes and Benefits Realisation within the agreed timescale and budget
- Provide Leadership, ensure programme aligned with Council's vision and strategic outcomes
- Business Case assessment and authorisation, ensuring all work streams are progressed against a robust business case
- Advocate and champion the programme, actively supporting business change within directorates and service areas
- Ensure decisions are made swiftly to maintain progress within the decision-making framework
- Support the programme team, ensuring appropriate resources are available and any blockages are overcome, enabling the team to deliver

- Governance and performance monitoring, ensuring plans are in place to deliver to agreed deadlines, risks are appropriately mitigated, dependencies are managed, and delivery is within budget
- Engagement, ensuring all stakeholders are identified and engaged appropriately at every stage of the programme, actively encouraging engagement, and actively seeking feedback from all stakeholders

2. Informed Technology Choice and Design Principles

- 2.1 The initial stages of the programme focussed on completing a ‘discovery’ phase to develop fully informed requirements and business case. This phase involved identifying pain points, operational problems, inefficient ways of working as well as understanding the current user-base profiles, technology costs, limitations of existing systems.
- 2.2 The programme team also engaged with other Councils / Public Sector bodies who had initiated or completed similar transformation programmes (e.g. Harrow, Birmingham, Lambeth, Croydon, Scottish Water). Valuable insights into lessons learnt were captured (key points below) – which have continued to be a running theme in ongoing discussions:
- Avoid bespoke customisation – change ways of working to exploit standard functionality wherever possible
 - Ensure adequate resourcing of the project team – free up ‘Subject Matter Experts’ to ensure dedicated time can be allocated
 - Work with experienced implementation partners
 - Don’t compromise on testing and training
 - Ensure effective engagement and involvement of business users
- 2.3 A technology options appraisal was undertaken, and a business case developed with support from SOCITM (Public Sector Technology Advisory Service). Overarching programme aims and design principles were agreed by the Board (diagram below), and continue to be used as reference points that continue to inform design decisions and approach:

Core Business Transformation Programme – Aims and Design Principles



3. Benefits Outlined in the Business Case

- 3.1 Feedback from staff and managers across the Council (including staff survey results) highlighted a pressing need for easier, quicker and more efficient ways of 'doing business'. The ongoing financial challenges and associated staffing reductions across the Council are significantly increasing workload and front-line service delivery pressures. These are exacerbated by time-consuming and 'clunky' operational processes relating to 'core business' (i.e. finance, people, payroll, procurement, contract management).
- 3.2 In order to meet the needs of staff and managers the programme aims to deliver the following benefits that were articulated in the business case:
- **Support Service Improvements** – Support services have delivered significant savings to date with ambitious plans to deliver more, however progress is severely hampered due to out of date, old-fashioned technology. Further savings can only be achieved through exploitation of modern integrated technology i.e. digital workflows across integrated modules, automation, self-service, dashboards and better business intelligence tools.
 - **Procure to Pay (P2P)** – The use of supplier catalogues and supplier self-service alongside modern P2P functionality that will enable the Council to exploit opportunities around rebates and discounts and leverage greater buying power to reduce prices.
 - **Finance** – system generated financial projections with easy-to-use functionality enabling budget managers to be less dependent on finance practitioners.
 - **Integrated dashboards and work-flow** – fundamentally change how Council employees interact with IT systems and the data held within them. The system will push relevant information to users so they can pick-up and complete workflow tasks within their own role-based personalised dashboards that provide real-time, readily available information rather than having to react to automated or manually produced e-mails, maintain their own independent databases and spreadsheets or take time interrogating systems to find the required data.
 - **Mobile working** - support new ways of working, enabling staff to work remotely through access from mobile devices. This will allow all staff to complete workflow tasks 'on the go' regardless of location.
 - **Reporting** – intuitive user-defined reports via dashboards that visually depict information using bar charts and graphs, improving the flow of information into the decision-making process.
 - **Compliance and information governance** - remove the need to hold and process large amounts of data on spreadsheets and databases which are outside of the core IT systems.
 - **Continuous Improvement** – Modern systems are regularly updated and enhanced (usually quarterly) to take advantage of new innovations helping to drive continuous improvement in ways of working.
- 3.3 The discovery phase informed an initial strategy of a simplified landscape and a rationalisation of applications through procurement of a single integrated ERP solution; a strategy that was found to be commonplace (and largely successful) in most of the organisations engaged with at that time. Following approval of the business case by Executive Board in Oct 2020, a procurement process was initiated.
- 3.4 However, ongoing market research coupled with assessment of bids received, indicated we'd reached 'cross-roads' in the market and new strategies for business technologies were emerging. Gartner (Global Technology Research Consultants) were advising caution in implementing "monolithic" ERP systems, and instead indicated a more "modular, cloud-based, interoperable" approach – an ecosystem of integrated or loosely coupled 'best-of-breed' systems – that would provide the optimum cost effectiveness and flexibility in the long term.
- 3.5 As a result, the CBT Board agreed to stop the procurement process (February 2022) and engage external Consultants Ernst & Young (EY) to support a short, focused piece of work during spring 2022

to inform a further options appraisal, provide a recommended shortlist of suitable interoperable technology solutions, implementation roadmap, resource requirements, business change approach and revised business case.

4. Delivery Framework

4.1 As a result of the engagement, EY provided the programme team with a delivery framework to support successful achievement of the programme aims, this included:

- Revised Business Case
- A recommended technology option for Finance that aligns with corporate IDS strategy
- Shortlist of suitable technology options for HR/Payroll and Procurement
- Recommended phases and timescales to manage risks and resource availability
- Recommended resource profile
- Function taxonomy maps Level 1 – Level 4
- Recommended business change and communication strategies
- Recommended Target Operating Model(s)
- Current State Assessments and Future State Blueprints

5. Audit, Data and Equality Assurance

5.1 Due to the scale, complexity and risks associated with the programme, ‘real time’ project assurance is being provided by the Head of Finance – Internal Audit, who as well as being a member of the CBT Board, works closely with the Programme Manager to ensure adherence with corporate governance arrangements, undertakes assurance reviews and presents assurance reports with recommended actions to Board on a quarterly basis. Other members of the Internal Audit team are involved in workstream meetings where required. The External Auditors (Grant Thornton) are meeting with key members of the Finance workstream during September to agree an audit plan that will take in a review of progress, project governance and technical aspects of design, testing and data migration.

5.2 The new solutions involve the cleansing, migration, and integration of a significant volume of business critical and personal data (i.e. financial data, supplier data, employee data). This presented some key risks in the Data Protection Impact Assessment, therefore ‘real time’ support is also being provided by the Information Governance Team; with an IG Officer being part of the programme team providing oversight and advice at all relevant stages of the programme and undertaking regular reviews of the Impact Assessment. The Head of Information Governance is a member of the CBT Board.

5.3 The business and technology change impacts all staff, therefore the team are working closely with the Staff Network Groups to ensure equality and inclusivity are inherent in design and delivery. Equality Impact Assessments have been completed with a checklist of actions identified that are regularly reviewed and updates on progress periodically provided to Board, ensuring accessibility requirements are incorporated into all test and deployment plans. Regular updates are provided at Trade Union forums.

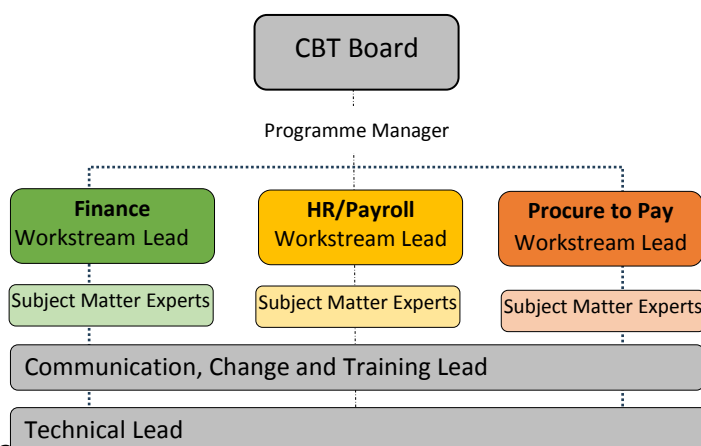
6. Phased Workstream Approach

6.1 Taking into account the recommendations provided by EY, a 3-year roadmap for the procurement and implementation of the multiple solutions that will build, in effect, a “modular ERP” has been agreed by CBT Board as follows:

	Tasks	Estimated Timescale
Finance	Phase 1 <ul style="list-style-type: none"> • Replace FMS and Civica Financials with MS Dynamics F&O 	May 23 – Dec 24
	Phase 2 <ul style="list-style-type: none"> • Hyper care and post-go-live bug fix • Agree back log for post-go-live development 	Dec 24 – Jan 25 Jan 25 – March 25

	Tasks	Estimated Timescale
	Phase 3 <ul style="list-style-type: none"> Develop continuous improvement plan / roadmap to exploit MS tools i.e., process automation, AI, chatbots/co-pilot. Review Kefron (automated invoice payments) assess capability within Dynamics F&O (contract expires Nov 25) 	Apr 25 – Mar 26 (ongoing) Apr 25 – Nov 25
HR/Payroll	Phase 1 <ul style="list-style-type: none"> Replace Cornerstone with MHR Recruitment Replace SAP with MHR HR/Payroll Extend Cornerstone L&D contract to Oct 27 	June 23 – Sept 24 June 23 – June 25 May 24 – June 24
	Phase 2 <ul style="list-style-type: none"> Identify business requirements for Occupational Health (as part of MS Access replacement programme) Identify business requirements for Learning & Development and Health & Safety 	May 24 – July 24 July 25 – Dec 25
	Phase 3 <ul style="list-style-type: none"> Hyper care and post-go-live bug fix for Recruitment and HR/Payroll Procure and implement new Learning & Development and Health & Safety modules. Develop continuous improvement plan / roadmap to exploit MS tools i.e., process automation, AI, chatbots/co-pilot 	Apr 25 – Aug 25 Apr 25 – Mar 26 (ongoing) Apr 26 – Mar 27
Procurement	Phase 1 <ul style="list-style-type: none"> Implement new solution for Purchase to Pay (as part of MS Dynamics F&O implementation) PACS to work with Go4Growth to review & simplify low value procurement processes and procedures. Undertake discovery phase and market engagement to determine business requirements for new solution. PACS to work with EY on contract review exercise – outcome to inform business case for new solution and new contract management framework 	May 23 – Dec 24 Sept 23 – Apr 24 Jul 23 – July 24 Dec 23 – June 24
	Phase 2 <ul style="list-style-type: none"> Procure and implement new Procurement and Contract Management solution (to replace Yortender) Design and implement new contract management framework 	Sept 24 – Aug 25 Apr 24 – Aug 25
	Phase 3 <ul style="list-style-type: none"> Develop continuous improvement plan/roadmap (explore integration opportunities and utilise price lists/catalogues, supplier portals) 	Aug 25 – Mar 26 (ongoing)

6.2 To successfully implement the solutions outlined in the roadmap, and enable ongoing continuous improvement, the following delivery model was agreed by CBT Board, with 3 workstreams (each with a dedicated lead and subject-matter-experts) focussing on transformation for each professional function, with cross-cutting Technical, Communication, Change and Training workstreams:



7. Programme Status

7.1 The programme status is currently rated AMBER. This is mainly attributable to the risk of not meeting the current planned go live dates for Finance and HR/Payroll. Although the new Finance and

HR/Payroll projects are currently on track to transition to the new solutions by the planned go live dates, both systems are complex and have a high degree of configuration, integrations and data migration requirements; finding defects during the testing cycles in the latter stages of the projects could result in the need to undertake some re-development work which would impact on planned go-live dates. This risk will remain until testing has been fully completed and signed-off.

8. Roadmap Status

8.1 The table below shows the status (as at 31st July) of the technology replacement projects contained within the roadmap:

Workstream	RAG	Strategic Lead	Update
Finance	Orange	Finance	<ul style="list-style-type: none"> Dynamics implementation in progress – Go live Dec 2024 Work continues - some outstanding design issues remain, FIT nearly completed, E2E and UAT commenced
Core HR/Payroll	Orange	HR/BSC	<ul style="list-style-type: none"> Timeline and go-live date have been re-planned – cutover for wave 1 April 2025, wave 2 June 2025 A/w outcome of the Pay Day consolidation consultation - outcome could impact on timeline
Recruitment & Onboarding	Green	HR	<ul style="list-style-type: none"> Transformation work underway - being led by HR (local Resourcing Officers identified) Contract variation signed off. Design completed and first release will be August 2024.
Learning & Development	Green	HR	<ul style="list-style-type: none"> Current Cornerstone contract ends Oct 2024 – looking to extend/renew existing contract to 2027 to enable further market research and possible subsequent procurement exercise. Work to review Cornerstone license numbers complete.
Health & Safety	Orange	HR	<ul style="list-style-type: none"> Core HR includes a basic health & safety module – to determine functionality within MHR
Occupational Health	Orange	HR	<ul style="list-style-type: none"> CBT Board agreed to defer to Phase 3 – however this is impacted by Access Replacement programme. Options for solutions (interim and long term) are being explored. IDS identified that Power Platform tools could be utilised to develop a long-term solution that would meet business needs. Recommendation being developed by IDS.
Source to Contract	Green	PACS	<ul style="list-style-type: none"> Business Readiness activities including Contract Management improvements and work undertaken with Go4Growth to support procurement policy, process and templates review. Contract management framework, including score-carding and strategic segmentation being developed with intention to launch July 2024 PACS work with Ernst & Young (EY) now complete and c.£950k savings obtained. Lessons learned fed into S2C business case, and a contract management action plan developed Contract Management Assurance Board (CMAB) to be integrated into Financial Challenge Group to provide corporate assurance over performance/risk Business case for Source to Contract technology approved via DDR – decision on forward plan until 9th August.

9. Budget Position

9.1 The business cases for the new Finance and HR/Payroll solutions were approved by Executive Board on 19th Oct 2022 and 8th Aug 2023 respectively, which totalled a combined delivery budget of £18.48m. Based on existing timelines, the current projected spend position at 31st July is:

Spend Category	Previous Years' Spend £000	Projected Spend 24/25 £000	Projected Spend 25/26 £000
Internal Resource	3,885	2,333	218
External Resource/Consultants	4,603	3,035	297
Licensing	2,828	214	300
Archiving		200	200
Total	11,316	5,782	1,015

9.2 Due to the transformational nature of the programme and the very high degree of complexity, a £3m contingency was included in the cost projections. Due to two extension of Finance timelines, and the high level of resource effort the programme requires, this contingency is diminishing and currently stands at £367k. Any further extension to timelines would require additional funding.

Finance Workstream Update

10. Technology Choice

10.1 The Finance solution recommended as 'best fit' by Ernst & Young (following an independent functionality assessment that indicated >90% fit) was Microsoft Dynamics Finance & Operations (F&O). This aligned with the corporate strategy to leverage existing investment in Microsoft products. F&O is a module within the existing Microsoft Dynamics 365 eco-system and can be implemented within the Council's Microsoft Azure Cloud environment. The 10% gap in capability mainly relates to Income Management and Automated Invoice Processing – it was therefore recommended that the existing solutions remained in place and were integrated into Dynamics F&O until such time that this

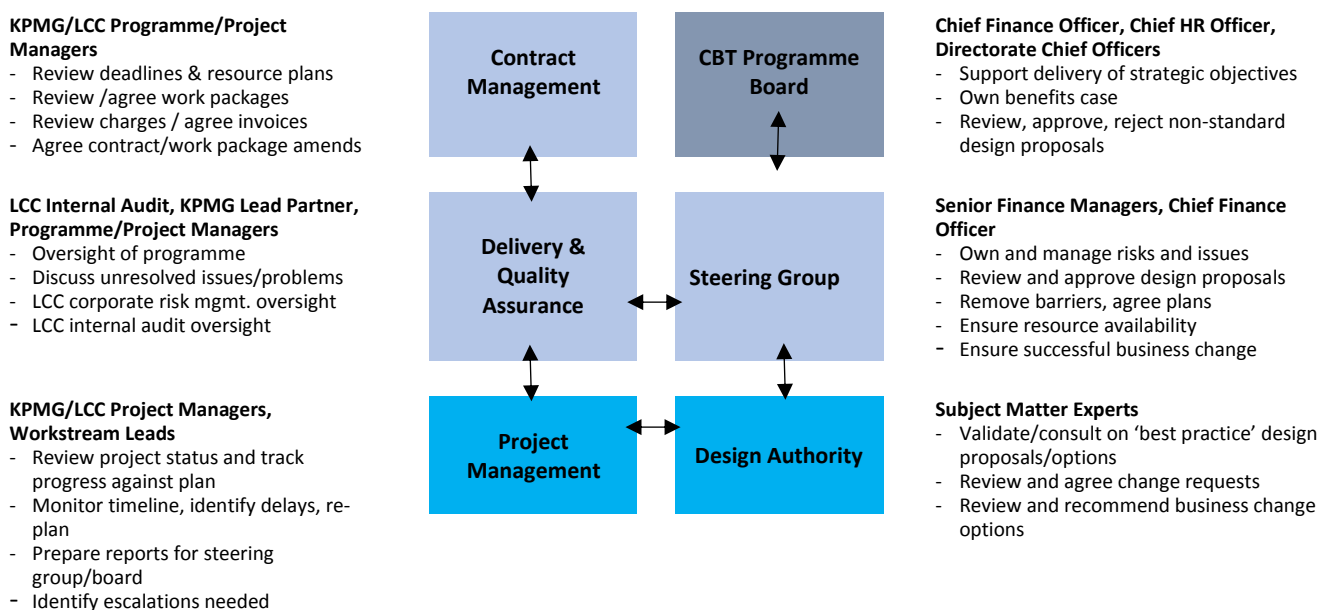
capability in F&O had matured sufficiently for adoption within LCC. The technology recommendation was agreed by CBT Board on 22nd Sept 22 and subsequent business case approved by Executive Board on 19th Oct 22.

11. Design Governance

11.1 An experienced implementation partner, KPMG, were procured in April 2023 to project manage the configuration and implementation of MS Dynamics F&O. KPMG are using standard project management tools and have experience of implementing MS Dynamics in the public sector, using a proven standardised methodology - Powered Local Government (PLG) which utilises CIPFA compliant leading practice assets, i.e.:

- CIPFA recommended Chart of Account structure
- Financial Report templates based on Council-published statements/reports
- Pre-designed and tested enhancements to plug known product gaps
- Fully CIPFA code compliant on non-current asset accounting
- Budgets and forecasts based on establishments and positions
- Change and training strategy

11.2 KPMG’s PLG methodology includes a ‘Design Authority’ model that ensures robust management of design and configuration proposals:



11.3 Although the programme has agreed an “adopt not adapt” design principle, it was inevitable that an ‘off-the-shelf’ solution would have gaps in business-critical functionality required by a large and complex Local Authority. KPMG brought several pre-designed/pre-tested local-government-specific enhancements. It was agreed by at the outset that whilst additional ‘enhancements’ (or add-ons) to meet business critical needs would be considered (where business change is not a viable option), requests for bespoke customisation of the system that impacted on the ‘core accounting’ capability would be rejected.

11.4 Where gaps in standard functionality are identified, options are appraised by the Design Authority. All proposals are documented and include following supporting information:

- Summary of gap/design issue
- Recommendation
- Volumes/value
- Options - alternative work arounds / business change / best practice

- Benefits of recommended solution
- Risks / Impact of recommended solution
- Other information
- Change impact

11.5 Recommendations for enhancements agreed by the Design Authority are presented at Steering Group to provide assurance that proposals do not adversely impact accounting integrity. Enhancements that require additional development work or attract additional costs are escalated to CBT Board for approval. All design decisions are documented and reflected in the ‘Design Blueprint’.

11.6 A separate Delivery & Quality Assurance Board was established at the outset, meets monthly and is chaired by Leeds City Council’s Head of Finance – Internal Audit to provide oversight and a mechanism for any issues or concerns to be raised and addressed.

11.7 Given the scale, complexity and risk associated with a new Finance system implementation, Microsoft are also providing support and oversight through their “Fastrack Ready Partner Programme” which is designed to help customers achieve successful implementation of Microsoft cloud solutions:



11.8 The project team meet monthly with a Microsoft Senior Solution Architect who provides advice, guidance and pre-go-live assessment on architecture, functional and technical designs and build to:

- Ensure customer outcome
- Identify risks
- Ensure customer understanding
- Identify where Microsoft can help

11.9 The Finance workstream lead has recently convened a regular forum of other Local Authority Dynamics F&O Users to ensuring ongoing sharing of knowledge and lessons learnt.

12. Development & Implementation Timeline

12.1 The indicative implementation timeline proposed by Ernst & Young was 2 years (go live 1st April 2025). However the Programme Team and KPMG have collectively been working towards a more ambitious and challenging timeline to minimize cost and pressure on ‘business as usual’ and accelerate the introduction of more modern and efficient ways of working. KPMG were originally engaged to achieve a go-live by April 2024. This was reviewed in November 2023, and subsequently extended to October 2024. This was reviewed again in May 2024 and subsequently revised to 1st December 2024, which given the complex nature of implementing a new Finance solution and the current work pressures on Financial Services, is still challenging and is subject to regular review as the team work through the remaining project stages as follows:

Activity	Period
Functional Integration Testing	1 st June – 16 th August
End to End Integration Testing	1 st July – 13 th September
User Acceptance Testing Preparation (identify and train testers, develop scripts)	1 st June – 30 th August
User Acceptance Testing – Phase 1 (Budgeting, Fixed Assets, Project Accounting)	1 st July – 16 th August
Data migration #4	w/c 19 th August
User Acceptance Testing – Phase 2 (Purchase to Pay, Sundry Income, Financial Control/Reporting)	1 st Sept – 30 th Oct
Power App development and testing (agreed enhancements)	1 st June – 30 th Sept
User Acceptance Testing – Phase 2 (Power App developments)	1 st Oct – 31 st Oct
Training preparation (development of materials, training delivery user guides and e-learning)	1 st June – 31 st Oct
Training delivery (in-person)	1 st Nov – 30 th Nov
Cutover preparation and rehearsals	1 st Nov – 30 th Nov
Cut-over / Go-live	1 st December

13. Workstream Progress

13.1 A number of sub-workstreams were established to ensure successful design and delivery of the new solution. The table below provides an overview of status of these workstreams with progress, risk/issues and mitigations being reported to the Finance Steering Group on a fortnightly basis and CBT Board on a monthly basis:

● Solution Design	● Testing	● Info Governance & Security
● Technical Infrastructure	● Operational Support	● Chart of Accounts
● Data Migration	● Reporting	● Cut-over and readiness
● Change	● Integration	● Power Apps
● Training		

14. Key Risks

14.1 As at 31st July, a number of critical/high risks and issues are being actively managed and mitigated:

RAG	Risk	Mitigation
●	Uncertainty for the timescale for the completion of interface development and unit testing.	KPMG and LCC/Fujitsu team to conduct joint testing sessions to increase the speed of triage and resolution as issues found. Daily stand ups for KPMG/LCC Integration teams. Exploration of testing automation as mechanism to speed up testing.
●	Risk of overwork and stress for project team members and SME's	Backfill / alternative delegation arrangements have been put in place in Finance to ensure staff have sufficient time to dedicate to project.
●	Risk of not achieving 1 st December go-live or with reduced business readiness	Regularly review approach to test phases to mitigate against delays. Ensure SME's are 100% focussed on completing design / UAT / training development
●	PowerApps Development required to minimise licence costs	Contracting for the implementation in progress. Need to focus on MVP to minimise cost, effort and risk.
●	Interfaces/config changes brought into scope after FIT/E2E testing has been completed could create regression issues	Minimise additions. Maintain development and test environments outside the FIT/E2E/UAT path
●	Risk of additional effort/complexity if test phases overlapping Impact may include: - Resource constraints - Regression issues - Complicated release path- Issues from multiple phases concurrent - Duplicated issues	Utilise dedicated Test Manager resources on KPMG and LCC side to closely plan, monitor and control test phases.
●	SME's for R2R, A2R and P2R are being drawn into BAU work and cannot devote sufficient time to the project	KPMG Consultants and Test team to support with development of test scripts. Finance to ensure SME's are relieved from BAU work to focus on project work.
●	UAT not as thorough as planned	Financial Services to ensure SME's are relieved from BAU work to focus on UAT.

14.2 The highest risks associated with a go-live date of 1st December 2024 are attributed to the testing phases of the project, the allocated timescale to achieve completion and the availability of business resources to participate in end-user-testing. Although KPMG have designed test plans based on their experience of implementing MS Dynamics, there is always a variation in an organisations' technical environments, integration requirements, data quality and resource capacity, thus creating a risk that the time scheduled in the plan for testing is insufficient.

14.3 The current timescales scheduled for testing is challenging. To achieve the planned go-live date requires an overlap of test phases. This creates other risks relating to the complexity involved in managing resources and multiple rounds of regression testing. This is being mitigated by limiting the overlap to testing integrations with functional areas that have no integration dependencies, and detailed planning and management by KPMG and LCC Test Management resources.

- 14.4 Inability to achieve a go live date of 1st December, will mean reverting to the go-live date to 1st April 2025, which is still within the originally planned programme timescales, however this would result in additional cost to retain KPMG and project resources for 4 months longer than currently budgeted for. However, this will need to be balanced with the risks of additional costs over a protracted period for the specialist resources required to fix defects or resolve issues in a live, operational environment, and the potential disruption to budget monitoring, paying suppliers and/or collecting income.

HR/Payroll Workstream Update

15. Technology Choice

- 15.1 Following a series of needs analysis workshops, Ernst & Young provided LCC with shortlist of suitable options. The HR module within MS Dynamics was included as an option given the corporate strategy to exploit existing Microsoft solutions, however, following an independent functionality assessment, gaps in business-critical functionality were identified which indicated a <75% fit.
- 15.2 Leeds City Council's HR/Pay landscape is complex; services are provided to staff who are directly employed by LCC in directorates and maintained schools as well those staff directly employed by external Academies and other affiliated external organisations (e.g. Aspire, Grand Theatre) this means having to accommodate various different terms & conditions, pension schemes and multiple pay days for approx. 35,000 employees.
- 15.3 Therefore the recommendation to proceed to procuring an externally hosted Cloud solution with a proven track record in Local Government and would seamlessly integrate the MS Dynamics F&O was agreed by CBT Board on 22nd Dec 2022.
- 15.4 As part of the procurement process, shortlisted providers were required to attend engagement sessions and provide in-depth demonstrations to HR/Payroll Subject Matter Experts to ensure a solution could meet the Council's complex requirements. The successful bid was received from MHR for provision of externally hosted HR/Payroll Cloud technology and implementation services. The contract was awarded following approval of the final business by Executive Board on 8th Feb 23. Provision of the Recruitment & Onboarding modules were subsequently included to the contract from the same supplier on 10th Jan 24. The new solutions will be known as "MyRecruitment", "MyPeople" and "MySelfService" within LCC to reflect the new solutions being corporate 'staff management tools' for use by managers and staff.
- 15.5 Sourcing the remaining solutions within the HR/Payroll workstream (Learning & Development, Health & Safety and Occupational Health) will be commence during 2025/26 as part of phase 3, following the implementation of the core HR/Payroll, Recruitment and Onboarding solutions. In the interim the contract with Cornerstone for the provision of the existing L&D solution will be extended for a further 3 years.
- 15.6 The HR/Payroll technology choice has presented the Council with the opportunity to provide all staff with access to new HR/Payroll self-service tools. Currently only digitally-enabled staff (predominantly office based) are able to access self-service tools, with 'off-line' staff continuing to be dependant on manual, paper-based processes. The new HR/Payroll technology will help the Council to deliver a long-held ambition to remove the 'digital divide' with all staff being able to access self-service tools via LCC or personal devices (i.e. interactive payslips, submit leave requests and overtime claims, maintain personal information, apply for jobs, direct access to communications/information). This will also contribute to easing workload pressures on those staff who support off-line staff by eliminating associated (and often duplicate) manual processes.

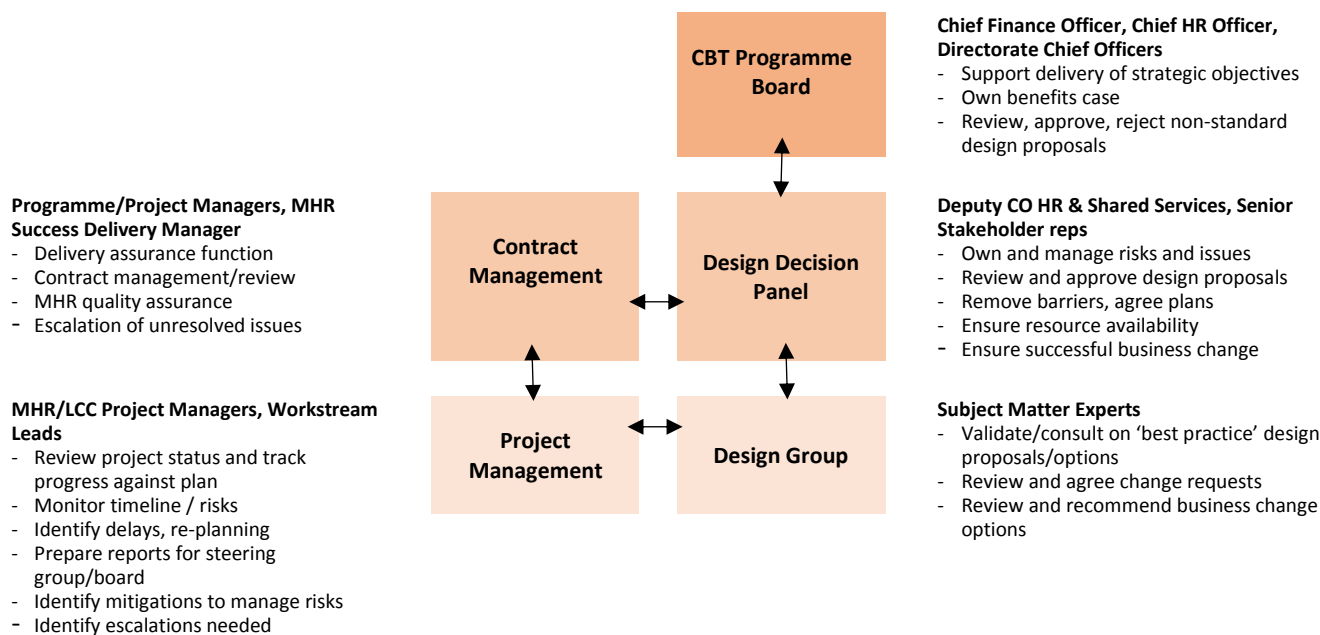
16. Design Governance

- 16.1 A 'Design Authority' governance model was also established for the HR/Payroll workstream to ensure adherence to "adopt not adapt" design principles. The HR/payroll solution is an off-the-shelf, externally hosted solution. Although flexible and highly configurable, requests for bespoke

customisation that adversely impacts 'core' payroll processing would not be supported by the supplier, and this was clearly articulated at the outset by the supplier, which was in turn articulated to LCC users/stakeholders.

- 16.2 MHR ran a series of initial 'design' workshops with Subject Matter Experts to discuss and agree configuration requirements. Decisions that resulted in a change to current ways of working or configuration requirements that differed to the current system were escalated to the HR/Payroll Design Decision Panel, with full options analysis. Given the solution is highly configurable and designed to cater for Local Government, there were no requests for enhancements. The HR/Payroll workstream lead has joined the MHR Local Authority User Group which is the mechanism for identifying and submitting ideas and requests for improvements and enhancements to the supplier.

HR/Payroll Design Authority Model:



- 16.3 This project has been used as an opportunity to review the currently complex configuration requirements such as number of payrolls, organisational groupings and pay days to minimise the complexity, timescale and cost of this and any future system implementations.

- 16.4 The transition to the new Recruitment module (MyRecruitment) commenced August 2024 and will be fully completed by April 2025 alongside the go-live of MyPeople and MySelfService. Given the size and scale of the LCC payroll service, to minimise the risk of problems impacting the whole workforce, 'go-live' for HR/Payroll will take place in 2 waves - (1) April (2) June. This is subject to continual review as the team work through the milestones.

- 16.5 A key component of successful 'cutover' to the new system is ensuring a sufficient period of 'parallel running'. This requires the preparation and processing of payroll in the current and new system simultaneously for a period leading up to go-live, with results being compared to identify discrepancies. Parallel running is currently timetabled to commence in January 2025 and run to May 2025. The BSC are in the process of recruiting additional temporary staff to support the additional work. Following completion of the test phases and parallel running, a recommendation will be taken to CBT Board on "go" or "no go" in terms of go-live, with all options fully risk assessed. It has been noted by the Board whilst the go-live waves are in progress, LCC will be unable to apply any pay awards.

17. Development and Implementation Timeline

- 17.1 The indicative implementation timeline proposed by Ernst & Young was 2 years (go live 1st April 2025). However the Programme Team and MHR have collectively been working towards a more ambitious and challenging timeline to minimize cost and pressure on 'business as usual' and accelerate the

introduction of more modern and efficient ways of working. MHR were originally engaged to achieve a go-live by April 2024. This was reviewed in November 2023, and subsequently extended to April 2025, which given the scale and complexity of LCC Payroll, remains challenging and is subject to regular review as the team work through the remaining project stages as follows:

Core HR/Payroll Phases	Period
Data migration rounds 1-6	1 st Feb 24 – 31 st Jul 24
Base system acceptance testing - LCC configuration	1 st Mar 24 – 31 st July 24
Integration development	1 st June 24 – 31 st Aug 24
User Acceptance Testing	1 st July 24 – 1 st Dec 24
End to end Testing	1 st Aug 24 – 31 st Dec 24
Patch SAP	1 st Jan 25 – 28 th Feb 25
Wave 1 – data cut from SAP	Jan 25
Wave 1 – parallel running	Feb 25 – March 25
Wave 1 – go-live	April 25
Wave 2 – data cut from SAP	March 25
Wave 2 – parallel running	April 25 – May 25
Wave 2 – go-live	June 25
Recruitment Phases	Period
Integration	1 st Apr 24 – 30 th Jun 24
Live Build	1 st Jun 24 – 31 st Jul 24
New requisition process	1 st Aug
Adverts go-live	12 th August
Interview scheduling go-live	12 th August
On-boarding / end to end process go-live	April 2025

18. Workstream Progress

18.1 A number of sub-workstreams were established to ensure successful design and delivery of the new solution. The table below provides an overview of status of these workstreams with progress, risk/issues and mitigations being discussed regularly with HR Leadership Team and reported to CBT Board on a monthly basis:

- Data conversion strategy
- Integrations
- Business Readiness
- Reporting
- Post- go live actions
- Training
- Design & Build
- Benefits realisation
- UAT strategy
- Communication
- Parallel running

19. Key Risks

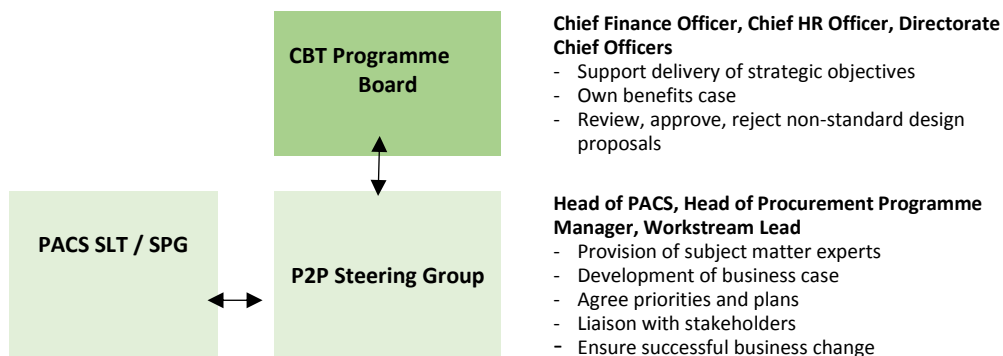
19.1 As at 31st July, a number of critical/high risks and issues are being actively managed and mitigated as follows:

RAG	Risk	Mitigation
●	Delay to timeline - if pay award needs applying during critical stage of the project	Pay award to be scheduled to be paid at a time outside of transition to go live
●	Availability of resources - complexities of interface development – will require significant LCC and MHR resources	IDS to utilise augmentation partner resources
●	User expectations not met– if new Identify management is not being developed in time for go-live	Dependency being tracked on Identify Management Project – dedicated PM – project on track
●	Availability of resources – year end patching of SAP would impact on resource availability to the project	Arrangements made to utilise external basis support partner where required
●	Data migration could be delayed if the automation programme is not completed by end August.	IDS developer to focus on completion of programme. Utilise Mandant or other team members for BAU work.

Procure to Pay Workstream Update

20. Background

- 20.1 Transformation of the 'Procure to Pay' (P2P) process began during 2019, when the BSC implemented Kefron (an automated invoice payment solution) as a separate stand-alone project. It was recognised that the ability to achieve full efficiency and digitisation of the end-to-end process was hindered by limited/lack of technology upstream in the process, which is now in scope of the CBT programme, and modernising the purchasing capability is underway as part of the MS Dynamics F&O implementation.
- 20.2 Given the cross-cutting nature of Procure to Pay, a P2P Steering Group was established and a dedicated workstream lead appointed to work closely with all stakeholders and undertake a "current state assessment" for Procurement and Contract Management with workplans and progress being reported to the CBT Board. Once technology implementation begins, this model will develop further into a design authority model as used by other workstreams:



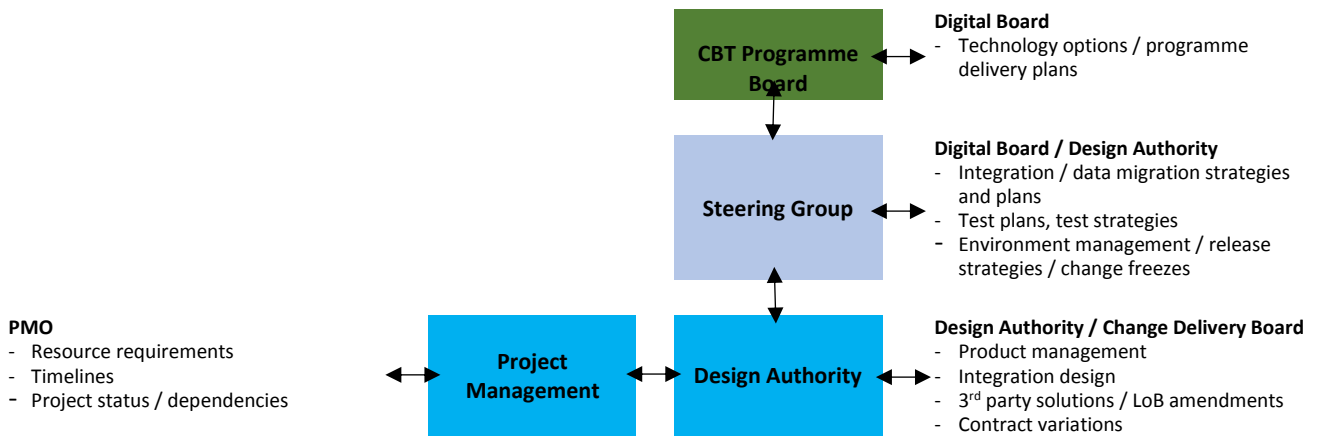
- 20.3 It was recognised by the Head of Procurement & Commercial Services (PACS) that it was timely to review and refresh of the current corporate procurement strategy which expires in 2024 and a revised version needing to take into account the revised Public Procurement Regulations (due Oct 2024).
- 20.4 Procurement & Commercial Services (PACS) engaged the support of the Local Government Association's (LGA) National Procurement Advisory Group (NAG) who initiated a Peer Review during spring 2021. The review found that as well as very limited digital capability, there was no consistent approach to contract management hindering the ability to produce comprehensive contract/spend intelligence. The peer review recommended a number of actions (incorporated into overarching Action Plan) currently being delivered by PACS, which included the development of a contract management framework as well as the adoption of new "Source to Contract" technology to improve efficiency and compliance and digitisation of the end-to-end process.
- 20.5 To inform a technology business case, 3 further pieces of work were initiated:
- Market engagement with Source to Contract technology suppliers
 - Engagement of Ernst & Young on a contract review and assurance project to aid the development of a Contract Management Framework that would, in turn, inform potential for savings as well as technology requirements
 - Engagement with other public sector organisations (multiple Local Authorities, NHS ICB, Leeds Teaching Hospitals) to understand how they have met similar challenges. Lessons learnt include:
 - Confirmation that more efficient ways of working can be achieved through use of more comprehensive, modern technology
 - Robust contract management can achieve significant savings – and modern systems can support monitoring and compliance through production of robust intelligence
 - Technology alone will not achieve savings – investment also had to be made in supporting and upskilling Contract Managers
- 20.6 PACS also engaged in work with the Cabinet Office and Local Partnerships, who provided input into a transformation plan. This makes several key recommendations that will help the Council introduce best practice in contract management.

20.7 Culmination of the work has resulted in a business case for new 'Source to Contract' technology that will support more efficient ways of working through use of modern procurement platforms, with in-system processes, intelligence dashboards and self-service capability. It will also enable services to achieve savings and improved performance through more robust and compliant contract management. The business case was subject to comprehensive consultation and widely supported by CLT, CBT Board, Financial Challenge Group and the Portfolio Member, and as a result, the Director of Resources & Strategy approved the Business Case via delegated decision on 27th July 2024 enabling commencement of a procurement process. When completed, and the workstream moves to the implementation stage, design and governance arrangements that align with other workstreams will be established.

Technical Workstream

21. Governance Arrangements

21.1 Given the high degree of digital change and technical work involved in the design and implementation of the new solutions, design governance arrangements are linked into existing IDS governance arrangements as outlined below, to ensure appropriate oversight and that technical decisions taken in the programme align with IDS strategy and work plans:



22. Testing / Go Live Decision

22.1 Testing is split into four phases:

- 1) Unit Testing
- 2) Functional Integration Testing
- 3) End to End Testing
- 4) User Acceptance Testing

22.2 Both suppliers have developed test strategies and plans that have been reviewed and signed-off by LCC IDS. Taking lessons learnt from other Councils into account, the Board agreed that the protection of timescales assigned to testing is a key priority, to maintain clarity and integrity of test results and remedy of defects, and the project team do not take unnecessary risks in terms of overlapping test phases or reducing the scope of tests. LCC is responsible for ensuring appropriate testing is completed and the solution signed off as fit for purpose, therefore a dedicated and experienced Test Manager has been appointed to work with the Consultants to ensure appropriate planning, preparation, testing, defect identification and remediation and LCC sign-off. Progress, risks and issues are reported to Board.

22.3 Following completion of the test phases, a recommendation will be taken to CBT Board on “go” or “no go” in terms of live deployment, with all options fully risk assessed.

22.4 Any defects remaining upon completion of the testing cycles, will be categorised as follows:

- **Critical Severity:** Cannot go live with the defect – the defect is a severe malfunction of functionality for which there is no work-around
- **High Severity:** the defect is a malfunction which is grossly away from expected behaviour for which there is no work-around
- **Medium Severity:** the defect does not prevent operation but does not operate as it should – the defect has an agreed work-around
- **Low Severity:** the defect has not functional impact and does not need a workaround, but is an inconvenience

22.5 The CBT Board and programme team are very conscious that extending go-live dates would increase project costs, but also aware this needs to be balanced with potential additional and protracted costs associated with operational disruption, reputational damage and managing the risks to accounting or payroll integrity when attempting to identify and remedy defects in a live operational environment, and all risks and issues are monitored and mitigated as part of the standard project methodologies being utilised by the implementation partners and programme manager.

Communication, Change and Training Workstream

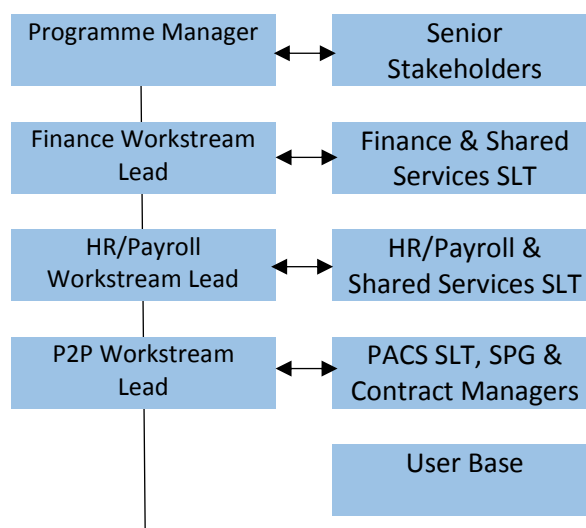
23. Stakeholder Engagement Channels / Benefits Realisation

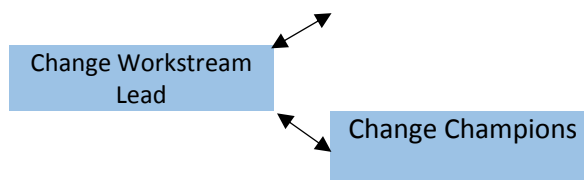
23.1 Both external partners provided a Change Manager to work closely with the LCC Workstream Lead to capture the business changes required to maximise the digital capabilities offered by transformation. A series of validation/design workshops ran throughout 23/24 which resulted in the following outputs:

- Communication Plan
- Change Impact Analysis
- Training Needs Analysis
- Benefits Tracker

23.2 The LCC Change Team are using these outputs to design and deliver communication and training activities to the user base and that required business change is successfully accommodated within operational teams. Realisation of benefits will be tracked as part of implementation and deployment activities and will be reported to the CBT Board on an ongoing basis.

23.3 Chief Officers representing the core business functions and Directorates are members of the CBT Board and are accountable for ensuring the successful business change and realisation of benefits in their respective services. The following relationships have been established to ensure effective communication and engagement, that training solutions meet business needs and arrangements are put in place to achieve the identified business change to enable the benefits outlined in the business case to be realised:





24. Savings and Continuous Improvement

- 24.1 Both the Finance and HR/Payroll business cases are predicated on the replacement of old, out of date technologies and/or current contractual arrangements expiring. This provides an opportunity to replace old systems with new, modern solutions that facilitate more efficient and modern ways of working.
- 24.2 Tools that provide modern, efficient ways that make it easier to do business will help alleviate current workload pressures arising from the mitigations being put in place to address ongoing financial challenges such as staffing reductions and recruitment freezes - staff survey results highlight workload pressures as an ongoing area of concern. It should be noted that significant savings have already been made in core business services since the approval of the business case. Financial Services made staffing savings of £1m in 2019 following a re-structure in anticipation of the implementation of a new, modern Finance System. Shared Services (administrators being predominant users of HR/Payroll and Finance systems) also made budget savings of £1m across 22/23 and 23/24, with a further savings target of £2m to be achieved in 24/25. Savings resulting from staffing reductions has resulted in increased work pressures and workloads, the new technology will help to reduce these pressures to a more manageable and sustainable level.
- 24.3 However, it was recognised in the business cases that the implementation of new Cloud solutions will act as an 'enabler' for ongoing improvements, efficiencies and more modern ways of working, not only in Finance, HR and Shared Services but Council-wide. To minimise implementation costs and achieve a transition to the new platforms as soon as possible, it was recognised that a 'minimum viable product' (MVP) approach would be required. Business requirements have been classified as Must, Should, Could, Would (MoSCoW), with those rated Must and Should being prioritised for development within project timescales, with any remaining requirements outstanding at go-live being put on a 'backlog' for development post-go-live that will form part of a development 'roadmap'.
- 24.4 Potential savings purely attributed to the introduction of the new technology over and above the savings already achieved have not yet been isolated. The initial 'go-live' has prioritised delivery of (as a minimum) core functionality that aims to replace existing capabilities. This will enable existing systems to be de-commissioned, which in the first instance will contribute towards IDS savings targets for 25/26 by eliminating existing on-premise software and hardware maintenance costs, however these savings will need to be offset against archiving costs which have yet to be identified.
- 24.5 Identifying additional savings relating to Finance, HR/Payroll, Procurement and Shared Services (as well as wider service teams) will be a phased and iterative approach. The programme has developed a 'benefits tracker' that captures improvements identified during the initial design stage. As the Council becomes more familiar with the full digital capabilities, additional benefits will be identified. A 'product owner' will be assigned to each new solution who will be responsible for working with services to ensure that the functionality offered by the new systems is utilised to achieve value for money. Additional benefits and opportunities will be captured and form a post-go-live "development roadmap" these will arise from process reviews alongside the new features and enhancements that are included in quarterly releases provided by the software supplier. It is envisaged that an annual cycle will be established after go-live to review the benefits delivered (both cashable and non-cashable) in the previous year as well as agreeing developments and improvements for the forthcoming year – this aims to ensure that services exploit the full capabilities on offer and achieve maximum value for money. The cashable savings identified will help inform savings targets allocated to services through the budget planning processes. Details of the roadmap and benefits realisation reports will continue to be provided to Financial Challenge on a periodic basis post-programme.



Equality, Diversity, Cohesion and Integration (EDCI) impact assessment

As a public authority we need to ensure that all our strategies, policies, service and functions, both current and proposed have given proper consideration to equality, diversity, cohesion and integration. In all appropriate instances we will need to carry out an equality, diversity, cohesion and integration impact assessment.

This form:

- can be used to prompt discussion when carrying out your impact assessment
- should be completed either during the assessment process or following completion of the assessment
- should include a brief explanation where a section is not applicable

Directorate: Resources	Service area: Core Business Transformation
Lead person: Suzanne Hopes	Contact number:
Date of the equality, diversity, cohesion and integration impact assessment: Version 10 : 29th August 2024	

1. Title: Core Business Transformation Programme
Is this a:
<input type="checkbox"/> Strategy / Policy <input checked="" type="checkbox"/> Service / Function <input type="checkbox"/> Other
If other, please specify

2. Members of the assessment team:

Name	Organisation	Role on assessment team For example, service user, manager of service, specialist
Helen Fallows	LCC	Senior Business Change Lead – HR/Payroll
Emma Browes	LCC	Head of Business Change
Suzanne Hopes	LCC	CBT Programme Manager
Jill Stuart	LCC	CBT team – finance lead
Mark Barrett	LCC	Head of finance/ business change
Manjit Ahlar	LCC	Project officer
Richard Charnley	LCC	Solution architect
John McPherson	LCC	CBT team – communications lead

Andy Keightley	LCC	Senior business partner
Anna Walton	LCC	Business Change Partner - people
Sophie Thom	LCC	Business Change Partner

3. Summary of strategy, policy, service or function that was assessed:

CBT is a programme to transform the way the council delivers its core People and Finance functions of Human Resources, Payroll, Finance and Procure to Pay (how we select, buy and pay for goods and services), both within the authority and to external partners and organisations as part of its traded service. It will therefore impact on every single employee as well as wider traded services customers and partners.

4. Scope of the equality, diversity, cohesion and integration impact assessment
(complete - 4a. if you are assessing a strategy, policy or plan and 4b. if you are assessing a service, function or event)

4a. Strategy, policy or plan
(please tick the appropriate box below)

The vision and themes, objectives or outcomes	<input type="checkbox"/>
The vision and themes, objectives or outcomes and the supporting guidance	<input type="checkbox"/>
A specific section within the strategy, policy or plan	<input type="checkbox"/>
Please provide detail:	

4b. Service, function, event
please tick the appropriate box below

The whole service (including service provision and employment)	<input checked="" type="checkbox"/>
A specific part of the service (including service provision or employment or a specific section of the service)	<input type="checkbox"/>
Procuring of a service (by contract or grant)	<input checked="" type="checkbox"/>
Please provide detail:	

The programme is first and foremost a business change programme which supports the Best Council vision (an efficient, enterprising and healthy organisation) and key strategic aims around people, money, digital capability, evidence and insights. The programme will drive continuous improvement and efficiency, increase workforce knowledge and skills and provide an excellent user experience for all staff/ traded customers/suppliers/partners.

A key enabler of the programme will be new technology to support the transformation. This will be modern, integrated and cloud based to replace the council's out-dated and fragmented software systems for People and Finance functions

What is achieved by 2025/26 and beyond will make the council more resilient and ready to navigate a period of unprecedented and uncertain change that extends well beyond the life of this programme.

5. Fact finding – what do we already know

Make a note here of all information you will be using to carry out this assessment. This could include: previous consultation, involvement, research, results from perception surveys, equality monitoring and customer/ staff feedback.

(priority should be given to equality, diversity, cohesion and integration related information)

Protected characteristics for overall workforce – dashboards updated every month.

Wellbeing surveys – in 2021 the least happy employees were disabled colleagues and working carers.

We know we have a range of suppliers and that not all are geared up for e-invoicing.

Employment policies (attendance, disciplinary, grievance, probationary and improving performance) are analysed annually by protected characteristics.

Results from engagement with front line colleagues, mainly in CEL through the “attitude to digital” survey. Update March 2022: More info from other frontline service areas is needed and therefore the survey has been widened to other non LCC IT enabled staff groups with the survey extended to end March 2022. Update May 2022 : 460 responses were received. Findings reported to CLT via a B paper and shared with key stakeholders including the TUs.

We have mapped out the current two tier workforce with digital inequality and also mapped out the future context with a one tier workforce with reduced inequalities.

We know about and understand our legal responsibilities regarding accessibility in technology. This is built and will continue to be built into procurement specifications. We have the DAWN staff network who are keen to work with us. We will hold “user story” workshops with DAWN members. Update September 2022 : workshops held and user stories will inform communication and engagement plans. Update May 2023: DAWN nominated a CBT rep who was then a part of the SME team who advised on the Core HR & Payroll procurement March/ April 2023.

We have records of those employees who use assistive technology and the type of technology they use. This info was shared with suppliers as part of the Core HR & Payroll procurement.

Are there any gaps in equality and diversity information

Please provide detail:

Protected characteristics for employees who contact the ICT helpdesk.

Protected characteristics for employees who do not have LCC digital access.

Some characteristics have lower levels of declarations in SAP eg: sexuality and religion and faith.

Do we hold protected characteristic info relating to our customers/ debtors?

We do not have information about employees who adjust the way they use technology on an ad hoc individual basis.

Update Nov 22 : as we move into procurement phase for finance implementation partner we do not currently know the protected characteristic make up of FMS users. Future Dynamics users may include people who don't use FMS now, they have not yet been identified.

We do not yet know whether other councils who are implementing Dynamics have experienced issues with implementation for those using assistive technology. The CCS frameworks are not as robust on EDI as we expected.

Update August 24 : a local authority Dynamics user group has been established. We specifically asked other LAs about the experience of their assistive technology users and have been informed it has been positive.

Action required:

Support "bring your whole self to work" initiative and other work to increase staff choosing to share their protected characteristics.

Investigate whether we can cross reference a report from the ICT helpdesk with SAP info to understand which groups of staff use the ICT helpdesk the most.

Find out what info we have about customers/ debtors. Update March 2022: It has been confirmed that we do not hold this information.

Nov 22 – cross reference the list of FMS users with protected characteristic info in SAP.

Build into procurement the requirement for suppliers to ensure new technology either works with current assistive technology or is superseded by new features.

Feedback to CCS regarding the weakness of EDI info within the standard framework info. Ask Harrow whether during implementation there have been any lessons learnt in relation to compatibility with assistive technology. Update: Harrow confirmed user experience of those using AT was positive.

6. Wider involvement – have you involved groups of people who are most likely to be affected or interested

Yes

No

Please provide detail:

Comms and engagement plan in place and continually reviewed. Initial stakeholder mapping exercise was updated April 2022 and is also continually reviewed.

Extended BCLT sessions held end of November 2021 and May 2023.

TU updates given at quarterly CJCC meetings on an ongoing basis – last update was 12th June 2024.

Directorate equality boards and staff networks engagement began February 2022 and agreement in place for regular communication and engagement. Regular attendance at Frontline reps group and DAWN.

HR team engagement sessions held January 2022 and feedback shared with HR leadership team and CBT team. Regular updates take place at HR team 'Shout outs' which are held weekly.

Analysis of attitudes to digital frontline staff survey complete and has been presented to CBT board May 2022.

BSC employment services engagement session held Sept 2022. Attended BSC leadership day May 2024.

Governance structure in place with monthly board meetings.

Focus groups of managers, online staff, offline staff, CBT professionals and senior managers held in summer 2022 to inform persona work.

July 2023 - engagement session for BSC and HR (over 200 attendees) Q&A site set up, MHR videos shared.

Spring/summer 2024 – testing team widened to include team managers and supervisors from BSC.

Dynamics Champions group established on Teams – over 140 champions volunteered from across the organisation, including assistive technology users. Engagement with Champions includes upskilling in broad digital skills – particularly M365.

In 2024 - Implementation of weekly 'protected time' for learning, briefings on the system and change workshops held for Finance Team professional users.

Engagement with Schools and other entities on the programme through School's Business Managers meeting spring 2024. Followed by briefing sessions and email updates.

Communications are being produced in accessible ways e.g. pay day change information in both Heyzine and plain text, letters to home addresses.

Briefing sessions held taking into account different working patterns e.g. early morning and evening sessions.

Equality impact checklist included in CBT Board Papers monthly:



**CORE BUSINESS
TRANSFORMATION**

Equality Impact Checklist

Equality Impact Assessments (Ongoing)

- ✓ Completion of the EIA from the start of the project (overarching aims and scope of the project), providing detail on:
 - Fact finding
 - Involving groups affected
 - Identifying key stakeholders
 - Positive and negative impact
 - The EDCI action plan
- ✓ Remains a live document throughout the project cycle
- ☐ Any risks/ significant barriers to achieving actions reported to Board and included on project risk register

Procurement (Repeat for subsequent rounds)

- ✓ Include EDI info gathering within market engagement
- ✓ Specification includes standard accessibility compliance requirements
- ✓ IDS to review submissions to ensure minimum regulatory compliance
- ✓ Additional accessibility requirements reflected in specification/contract additional agreements where required
- ✓ Requirements relating to equality and Council included implementation partner specifications
- ✓ Ensure specialist EDI knowledge/ experience is included in SME advisor group
- ✓ Include a separate method statement for EDI in evaluation

Design and Configuration

- ✓ Understand pre-built accessibility features
- ✓ Don't unnecessarily turn off available features
- ✓ Review list of assistive technology users and what technology is in use.
- ✓ Ensure specialist EDI knowledge/ experience feeds into design decisions
- ✓ Ensure language used for protected characteristics is configured by LCC

Training & Testing (testing currently in progress)

- Include assistive technology users during testing
- Include AT team. All aspects of system use need to be tested for compatibility with the AT in use across LCC.
- Cloned and anonymised data for testing and training.
- Robust testing plans. (Cyber team been asked for more detail following recent MoveIT example)
- Ensure the training needs of different users are met

Roll Out and Deployment

- Ensure help is available for assistive technology users
- Ensure comms/ guidance raises awareness of accessibility features
- Ensure comms are produced/ delivered in accessible ways
- Ensure up to date signposting info is available for users who need and wish to improve their overall digital skills.
- Engage with TUs, staff networks and directorate equality boards

Ongoing Auditing & Review

- Gather feedback from assistive technology users
- Gather feedback from all users and identify if any disparity in satisfaction levels across different protected characteristics.
- Participate in supplier customer engagement forums
- Ensure impact of the regular software updates are understood and impacted users engaged early.



Action required:

Engagement session for finance teams. Update September 2022: session held in August 2022 focussed on future technology option.

CBT info needs to be made available to wider workforce either via Teams/ Insite/ Sharepoint. Update September 2022 - CBT Insite page is live.
Update July 2023 – HR/BSC professional users sharepoint site live

7. Who may be affected by this activity?

please tick all relevant and significant equality characteristics, stakeholders and barriers that apply to your strategy, policy, service or function

Equality characteristics

Age

Carers

Disability

Gender reassignment

Race

Religion or Belief

Sex (male or female)

Sexual orientation

Other

(Other can include – marriage and civil partnership, pregnancy and maternity, and those areas that impact on or relate to equality: tackling poverty and improving health and well-being)

Please specify:

Stakeholders

Services users

Employees

Trade Unions

Partners incl NHS & schools

Members

Suppliers

Other please specify : other people who are end users eg: external job applicants.

Potential barriers

Built environment services

Location of premises and

Information and communication

Customer care

Timing

Stereotypes and assumptions

Cost

Consultation and involvement

Financial exclusion

Employment and training

specific barriers to the strategy, policy, services or function

Please specify : TBC

8. Positive and negative impact

Think about what you are assessing (scope), the fact finding information, the potential positive and negative impact on equality characteristics, stakeholders and the effect of the barriers
8a. Positive impact:
<p>For all employees : “Access to information whenever, wherever I want on a device that I can use.”</p> <p>More equal access to information for all - not reliant on those in the know or the contacts people have.</p> <p>Could better enable future transformational activity (i.e. skills baseline increased)</p> <p>Technology can be standardised and positively impact those using core systems and needing reasonable adjustment.</p> <p>Enabling people to independently look after themselves and improve their lives (whilst at work or in their community) - Digital self serve.</p> <p>Inclusion of wider community (suppliers and citizens). Making access easy, open and equitable for all using our services.</p>
Action required:
<p>Ensure the benefits of standardisation are communicated and understood.</p> <p>For reasonable adjustments : ensure non-functional requirements align with web accessible technology.</p> <p>Recognising we are not the most diverse project group involve Trade Unions & staff networks sooner rather than later.</p>

8b. Negative impact:
<p>Accessibility software / tools might not work / might work differently.</p> <p>'Learning curve' will be greater (and possibly too great) for some groups which could lead to retention issues.</p> <p>Failure to digitise will make access to services difficult for people (specifically young people) joining the organisation/ affect our employer brand and make it more difficult to recruit the best talent.</p> <p>Could generate a greater divide between digitally confident and non-digitally confident.</p> <p>Nature of cloud based technology means there are regular updates which can be harder for some people to easily adjust to.</p>
Action required:
<p>Investment in change management / change agents in teams etc</p> <p>Review lessons learnt from other digital and change projects completed recently.</p> <p>Include affected people in User Acceptance Testing.</p> <p>Rapid action / priority to resolve accessibility issues and prior testing where possible.</p> <p>Update Nov 22: Ensure mechanism/ team/ support in place to ensure accessibility software continues to work with every update.</p> <p>Users need to know what user configurability features are available.</p> <p>Do not lock down features unnecessarily.</p>

9. Will this activity promote strong and positive relationships between the groups/communities identified?

Yes No

Please provide detail:

More equal access to employment related information for all staff. This will enable employees to be aware of and source support they need earlier.

Action required:

Ensure that when the implementation phase work is being planned that the full range of real work situations is recognised.

Review the outcome of the internal audit into “culture” to identify if this indicates whether some services will be harder to reach and therefore require more resource to engage than others. Update May 2023 : internal audit report reviewed, it supports the aims of the CBT programme.

10. Does this activity bring groups/communities into increased contact with each other? (for example, in schools, neighbourhood, workplace)

Yes No

Please provide detail:

It is expected that the new solution will include opportunities for two way employee engagement. The growth of the staff Facebook page during covid demonstrated that employees welcomed the chance to communicate across different services.

Action required:

Ensure acceptable use messages are built into all solutions.
Update: October 2023: the design session have shown that the opportunities for greater communication with employees/ sections of employees using the “company news” section of ESS are significant. Decision needed on who will own the development and content of this feature.
Update August 2024 : The head of HR for OD has been assigned as the project sponsor for the Insite review project and is already involved with the CBT project team.

11. Could this activity be perceived as benefiting one group at the expense of another? (for example where your activity or decision is aimed at adults could it have an impact on children and young people)

Yes

No

Please provide detail:

It is intended that the new technology will be easy to use but it will still mean employees and suppliers will have to have the access and ability to use it.

Action required:

Ensure design is user friendly and accessible to all.

Hold workshop to capture user stories from DAWN members. Update September 2022: workshops held.

Ensure the needs of assistive technology users is understood and addressed through procurement/ implementation and BAU. Update May 2023: AT info included in Core HR & Payroll procurement, next steps are to work with chosen supplier through implementation.

12. Equality, diversity, cohesion and integration action plan

(insert all your actions from your assessment here, set timescales, measures and identify a lead person for each action). *Once an action is complete/ embedded into BAU it will be shaded as grey.*

Action	Timescale	Measure	Lead person
Support “bring your whole self to work” initiative and other work to increase staff self declarations regarding their protected characteristics.	October 2021 onwards	Increase in % of employees recording their protected characteristics on SAP. Ease of self reporting in new system especially for frontline staff.	Helen Fallows (Confirmed with OD team that the bring your whole self to work continues.) Core and lead assessors within procurement exercise.
Investigate whether we can cross reference a report from the ICT helpdesk with SAP info to understand which groups of staff use the ICT helpdesk the most.	Prior to drafting staff engagement plan for first round of technology roll out.	Information on users of the helpdesk can be analysed by protected characteristics.	Sophie Thom
Further engagement with front line colleagues, through the “attitude to digital” survey.	October – March 2022	Survey carried out and results analysed and presented to CBT board – intelligence gained used to inform transformation activities.	Dylan Owen and Emma Browes
Find out what info we have about customers/ debtors.	October 2021	Info either is or isn’t available.	Suzanne Hopes – confirmed protected characteristics info is not collected for debtors or suppliers.

Action	Timescale	Measure	Lead person
<p>Involvement of staff networks</p> <p>Helen & Emma attended leads meeting 14th Feb 22 – agreement for ongoing engagement.</p> <p>Helen attended DAWN 23rd Feb – agreement for ongoing engagement.</p> <p>Helen, Shaun and Dylan attended 18th May, began user story work.</p> <p>Helen attended DAWN 2nd Nov 22 with overall update.</p> <p>Helen attended DAWN 14th Dec with update.</p> <p>DAWN CBT rep identified, involved in market engagement and part of SME team for procurement.</p>	<p>From February 2022.</p>	<p>Positive stakeholder support. Input into procurement decision making.</p>	<p>Different team members to take lead depending on topic.</p>
<p>Brief directorate equality boards.</p> <p>Attended: City Dev - 24th January 2022, 14th Dec 2022 CH&E 1st - March 2022 A&H 24th - February 2022 Resources – 16th February</p>	<p>From February 2022</p>	<p>Positive stakeholder support.</p>	<p>Different team members to take lead depending on topic.</p>

Action	Timescale	Measure	Lead person
Agreement for ongoing engagement.			
<p>Brief functional service areas.</p> <p>Two engagement sessions held with the HR team in January 2022.</p> <p>Engagement session held with finance team focussed on future technology choice, August 2022.</p> <p>Engagement session held with BSC employment services team September 2022.</p> <p>Whole HR team shout out update 16th Nov 22.</p> <p>July 2023 - engagement session for BSC and HR (over 200 attendees) Q&A site set up, MHR videos shared.</p>	From January 2022	Positive stakeholder support.	Change Leads for the functional areas.
Ensure the benefits of standardisation are communicated and understood.	Incorporate into staff engagement plan for first round of technology roll out.	Teams don't seek to create "work arounds". Efficiencies are realised.	Emma Browes and John McPherson.
For reasonable adjustments : ensure non-functional	From initial spec into procurement packages.	New systems are accessible to all. Users who have	Richard Charnley plus core and key assessor procurement team.

Action	Timescale	Measure	Lead person
requirements align with web accessible technology.		reasonable adjustments report a positive experience.	
Involvement of Trade Unions	Started Autumn 2021 and ongoing through quarterly CJCC.	Positive engagement throughout the project.	Emma Browes
Investment in change management / change agents in teams etc	Summer 2022 onwards – links to work with transformation partner. Update May 2023 ; DDR to increase change support drafted and approved.	Objectives of programme are met.	Suzanne Hopes
Review lessons learnt from other digital and change projects completed recently - Equality related lessons learnt are picked out and kept as separate document.	Autumn 2021 then ongoing	Lessons learnt are made available, are discussed and our project planning is amended as appropriate.	Live doc created on Teams site to pull out equality lessons learnt from the larger written docs.
Ensure that when the implementation phase work is being planned that the full range of real work situations (with particular attention to diversity) is recognised.	Autumn 2022 onwards	Objectives of programme are met.	Transformation leads Testing leads and SMEs
Ensure acceptable use messages are built into all solutions.	Incorporate into technology implementation plans.	Users are aware of acceptable use messages when using new technology.	IDS lead
Ensure design is user friendly and accessible to all.	Autumn 2021 then ongoing.	Built into specification from the beginning, tested through	Core and key assessor procurement team.

Action	Timescale	Measure	Lead person
		implementation and beyond into continuous improvement.	
Ensure info on the CBT programme is available to the wider workforce.	March 2022 and then ongoing	Awareness of the programme is increased. Employees have access to consistent info.	John McPherson
Hold User Story workshop with DAWN members.	Summer 2022	Positive stakeholder engagement.	Helen Fallows
Embed EDI within all procurement packages including scoring mechanisms.	1 st package for transformation partner April 2022. 2 nd package finance implementation Jan 2023. Third procurement Core HR & Payroll March 2023. Fourth procurement P2P Autumn 2024.	Assessed criteria for EDI (for TP proved decisive for one bidder who failed to meet the quality pass mark)	Procurement lead for each package.
Ensure selected TP is held to actions on EDI as detailed in their bid.	June 2022 – October 2022	Through contract management.	Dylan Owen
Engage with Business Disability Forum – join their procurement network.	May 2022 onwards	Share best practice and lessons learnt.	Helen Fallows
Cross reference FMS users with protected characteristic info held in SAP	By January 2023	Report available to feed into comms and engagement plan for finance tech implementation.	Jill Stuart & Anna Walton
Ask Harrow for lessons learnt from Dynamics implementation and assistive technology.	November 2022	Add to our EDI lessons learnt log and use to inform implementation plan.	Mark Barrett

Action	Timescale	Measure	Lead person
Feedback to CCS on the limitations of EDI info in current frameworks	November 2022	Feedback will hopefully be incorporated into later framework versions.	Helen Fallows
Include lead DAWN member in Core HR/ payroll supplier engagement sessions.	January 2023	Positive engagement and chance to see how suppliers approach accessibility in practice.	Emma Browes
Assistive Technology colleagues to attend CBT team meeting.	January 2023	CBT team members aware of the role of the AT team and the key AT which is used by LCC employees.	Helen Fallows
Identify EDI SMEs/ advisors to provide feedback on EDI sections of procurement.	December – January 2023	High quality evaluation of EDI sections of procurement packages.	All
Review the culture audit report	As soon as report is shared.	Greater understanding of areas that may require more support.	Helen Fallows
Review users of FMS, Civica financials, SAP self service and e-pay to inform the change impact analysis.	May 2023	Greater understanding of areas that may require more support.	Anna Walton
Take advice from functional experts on equality language within Core HR configuration	Oct – Dec 2023	Experts consulted and decisions taken by HR/Payroll design panel.	Helen Fallows
Include the Assistive Technology Team and assistive technology users during testing.	From August 2024	Products and systems are tested in the 'real world' by a diverse range of people – particularly those with accessibility requirements.	Emma Browes / SMEs / Test Leads

Action	Timescale	Measure	Lead person
		<p>Professional Assistive Technology colleagues test with a view on compatibility with AT use across LCC.</p> <p>Ensure the right help is available for assistive technology users & ensure comms / guidance raises awareness of accessibility features.</p> <p>Ensure the training needs of different users are met.</p>	
Cloned and anonymised data for testing and demonstrating the system.	From July 2024	Users receive training and are able to practice on real live data whilst retaining anonymity.	Change leads – Mark Barrett, Helen Fallows
Review of e-pay users to establish those with greatest need for support to move to digital ways of working & develop individual / group support packages.	<p>Audit August – September 2024.</p> <p>Develop support – ongoing.</p>	All staff are able to login and access Employee Self Service April 2024.	Emma Browes
Ensure Communications are delivered in an accessible way & meet relevant accessibility standards.	Ongoing	Information can be accessed and understood by all.	Emma Browes

Action	Timescale	Measure	Lead person
		Impact of regular software updates are understood and impacted users are engaged early.	
Signposting for users who need and wish to improve their overall digital skills.	Ongoing	Improved digital skills.	Sophie Thom
Update Quarterly CJCC	Quarterly	Trade Unions are up to date with progress.	Emma Browes
Update staff networks and directorate equality boards	By end October 2024	Networks and boards are up to date on progress.	Emma Browes
Implement ongoing feedback and review from users e.g. through testing, champions network, user adoption.	Ongoing	Feedback from a diverse range of users is considered throughout implementation and into continuous improvement.	Emma Browes / Change Leads

13. Governance, ownership and approval State here who has approved the actions and outcomes from the equality, diversity, cohesion and integration impact assessment		
Name	Job title	Date
Suzanne Hopes	Programme Manager	29.08.24
Date impact assessment completed		Ongoing, live assessment throughout programme

14. Monitoring progress for equality, diversity, cohesion and integration actions (please tick)	
<input type="checkbox"/>	As part of Service Planning performance monitoring
<input checked="" type="checkbox"/>	As part of Project monitoring
<input type="checkbox"/>	Update report will be agreed and provided to the appropriate board Please specify which board
<input type="checkbox"/>	Other (please specify)

15. Publishing	
Though all key decisions are required to give due regard to equality the council only publishes those related to Executive Board, Full Council, Key Delegated Decisions or a Significant Operational Decision .	
A copy of this equality impact assessment should be attached as an appendix to the decision making report:	
<ul style="list-style-type: none"> • Governance Services will publish those relating to Executive Board and Full Council. • The appropriate directorate will publish those relating to Delegated Decisions and Significant Operational Decisions. • A copy of all other equality impact assessments that are not to be published should be sent to equalityteam@leeds.gov.uk for record. 	
Complete the appropriate section below with the date the report and attached assessment was sent:	
For Executive Board or Full Council – sent to Governance Services	Date sent:
For Delegated Decisions or Significant Operational Decisions – sent to appropriate Directorate	Date sent:
All other decisions – sent to equalityteam@leeds.gov.uk	Date sent: