



Report of: Head of Applications Development

Report to: Chief Digital & Information officer

Date: 4th November 2019

Subject: Report to seek approval to commence a mini competition under the Councils Yorkshire & Humber Discovery and Development Services Framework (DN411258) to procure professional services to support the decommissioning of non-compliant corporate CRM system.

Are specific electoral wards affected? If yes, name(s) of ward(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Has consultation been carried out?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Are there implications for equality and diversity and cohesion and integration?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Will the decision be open for call-in?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information? If relevant, access to information procedure rule number: Appendix number:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Summary

1. Main issues

- The Applications Portfolio Programme capital scheme has as part of its remit, the requirement to ensure systems in use across the council are fully compliant. One of the council's major systems – the Contact 360 CRM system in use in Customer Services is end of life and no longer compliant and is currently being replaced via the development on an in-house solution.
- With the scale of work currently being undertaken by DIS and the business, and the timeframe the project has to work within, there is a need to supplement the team with specialist technical resources from the recently procured Y&H Development & Support Framework.

2. Best Council Plan Implications (click [here](#) for the latest version of the Best Council Plan)

- This work is required to ensure that council systems remain compliant and that the council is not exposed to unnecessary risk of cyber-attack.

3. Resource Implications

- In order to deliver the replacement of C360 by end October 2020, DIS needs to supplement its internal development team with additional resources from the recently established Y&H Development and Support Framework.

Recommendations

- The Chief Digital & Information Officer is requested to provide approval to commence a mini competition under the Councils Yorkshire & Humber Discovery and Development Services Framework (DN411258) to procure professional services to support the decommissioning of non-compliant corporate CRM system.

1. Purpose of this report

- 1.1 The purpose of this report is to seek approval to commence a mini competition under the Councils Yorkshire & Humber Discovery and Development Services Framework (DN411258) to procure services to support the decommissioning of non-compliant corporate CRM system.
- 1.2 This involves the engagement of specialist internal and external resources to undertake the necessary developments to replace the ageing and non-compliant C360.

2. Background information

- 2.1 There are approximately 500+ business systems and associated modules in use across the Council. The approach in LCC has always been that hardware and software will only be refreshed when we have extracted all the value from it and before supportability, poor performance and the potential consequential failure of critical business services becomes an issue. In April 2019 a programme of work was approved which would provide an ongoing long term programme of application maintenance and refresh, prioritised to ensure that the failure of business critical services is minimised and that council systems are compliant.
- 2.2 This report covers procurement of services required to support a specific project under the above scheme, to replace the end of life and non-compliant C360 3rd party CRM system with an in-house offering.

3. Main issues

- 3.1 The C360 system was Leeds City Council introduced Civica's Contact 360 solution for transactional web services in 2015. There are over 80 forms available for customers online, which are also used in a mediated form by Customer Services Officers either face-to-face or in the telephony contact centre. These forms capture the information needed to process requests for services such as Waste Management, Highways, Environmental Action and Housing. The forms offer end-to-end transactions through integration with line of business systems and aim to keep the customer updated via notifications where appropriate. The forms have been successful with higher than anticipated channel shift achieved in all areas.
- 3.2 As time has progressed a number of issues have been identified with the overall solution and the forms themselves. Leeds City Council is now out of support with Civica for Contact 360 and we have to cease its use in October 2020 due to its reliance on out-dated technical components which we are not in a position to uplift (specifically SharePoint 2010). A decision was taken in 2018 that rather than go out to procurement for a new third party replacement solution, we would build one in house, and thus the CATS (Customer Access Transactional Services) solution was born. As well as the online forms element, Customer Access identified a requirement for a functional CRM solution, something they have been missing for a number of years, and the CATS solution combines both these elements, as well as other key functionality, via loosely-coupled specialised components.

3.3 Due to the time constraints (replacement solution to be live by end October 2020) processes are being redeveloped on a like-for-like basis wherever possible, whilst including an element of front-end review to ensure Government Design Standards and accessibility guidelines are followed, as well as ensuring there is consistency throughout and that consideration of the customer experience is at the forefront of any decision making.

4. Corporate considerations

4.1 Consultation and engagement

4.1.1 Consultation and Engagement – This project is part of the already approved Applications Portfolio Programme scheme that has already been consulted on. The Deputy Leader of the Council and Executive Member were briefed on that scheme in 2018.

4.2 Equality and diversity / cohesion and integration

4.2.1 Equality and Diversity / Cohesion and Integration – a project specific EDCI has been completed with no impact identified. Whilst the project will implement a replacement solutions there is no issue regarding accessibility for all users.

4.3 Council policies and the Best Council Plan

4.3.1 Council Policies and City Priorities – Modern and ‘fit for purpose’ and compliant business applications are fundamental in the business effectiveness and efficiency of the 11,000 staff in the organisation who use these applications and databases as an essential and fundamental part of their daily work.

Climate Emergency

4.3.2 No impact.

4.4 Resources, procurement and value for money

4.4.1 In order to deliver this project within the required timeframe (end October 2020), the council needs to supplement its internal technical resources and as such is undertaking this mini competition against the Councils recently awarded Yorkshire & Humber Discovery and Development Services Framework (DN411258).

4.5 Legal implications, access to information, and call-in

4.5.1 The Yorkshire & Humber Discovery and Development Services Framework was procured and awarded by Digital and Information Services in accordance with Public Contract Regulation 2015.

4.5.2 This decision to commence the procurement is a Significant Operational Decision is not eligible for ‘call in’.

4.6 Risk management

- 4.6.1 If this work is not undertaken, the council will be at risk of losing PSN compliance and certification. In addition there is a high risk of additional costs and business failure as we operate on old and in unsupported and / or non-compliant applications. Finally, there is the risk of financial penalties levied on us in the event that we cannot deliver GDPR and PSN requirements. However, it is not possible to quantify what these penalties may be.

5. Conclusions

- 5.1 The council will utilise the recently awarded Yorkshire & Humber Discovery and Development Services Framework to commence a further competition to procure services to supplement the internal team to enable delivery of the replacement CRM solution by end October 2020.

6. Recommendations

- 6.1.1 The Chief Digital & Information officer is requested to provide approval to commence a mini competition under the Councils Yorkshire & Humber Discovery and Development Services Framework (DN411258) to procure professional services to support the decommissioning of non-compliant corporate CRM system.

7. Background documents¹

- 7.1 N/A

¹ The background documents listed in this section are available to download from the council's website, unless they contain confidential or exempt information. The list of background documents does not include published works.