



Report of the Chief Democratic Services Officer and the Chief ICT Officer

Member Management Committee

Date: 14th April 2009

Subject: Migration from Lotus Notes – Implications for Members

Electoral Wards Affected:



Ward Members consulted
(referred to in report)

Specific Implications For:

Equality and Diversity

Community Cohesion

Narrowing the Gap

1.0 Purpose Of This Report

- 1.1 This report has been produced both at the request of the chair of the Members ICT Reference Group and to allow the Chief Democratic Services Officer to consult with Elected Members on how best to manage the change from Lotus Notes to Microsoft Outlook making sure that all possible benefits for elected members are maximized and all possible problems mitigated where possible.
- 1.2 Elected members are asked to note the contents of the report and agree to series of “next steps” which are contained in section 3.18 of the report.

2.0 Background Information

- 2.1 In 2007 a upgrade programme for Council ICT stock was undertaken this programme caused a great deal of upheaval amongst Elected Members and resulted in some negative experiences and a great deal of negative feedback. To respond to these concerns and specifically to address the main concern of Elected Members which was a belief that decisions about ICT were being made by officers who did not appreciate or understand what their priorities were, a cross party working group with representatives for the three main political groups chaired by Cllr Graham Latty was set up.
- 2.2 This group the Members ICT Reference Group has met frequently, and was asked by Group Whips specifically to look at two issues:

- To investigate problems members were experiencing with ICT.
- To progress whether there was an appetite for an ICT casework system for Members and if there was to investigate this project.

2.3 In addition to these projects this group has also been utilised as a forum for general discussion and consultation with members on ICT issues. The group has been very keen to report back to MMC frequently and to be clear that it was not replacing the role of MMC but seeking to complement it.

3.0 Main Issues

The Casework System

3.1 A report titled Casework ICT Solutions for Members an Appraisal of Options was brought to MMC on November 18th last year. Following discussion of this report Members agreed that:

That more detailed work be undertaken to develop a full “Statement of Requirements” in order to establish the feasibility of developing a solution initially based on Option 2.

3.2 Option 2 was a casework system based on the new Microsoft Share Point system. Immediately following the meeting of November 18th, the ICT Reference Group met and agreed that officers should formulate a draft Statement of Requirements which met the wants and needs of Elected Members as they were expressed in the MMC report.

3.3 Following this meeting casework support officers from the Conservative, Labour and Liberal Democrat group offices met with colleagues from ICT and agreed the technical aspects which underpin the Statement of Requirements. This document has now been provisionally agreed and has been submitted to the small project board (the role of this board is detailed within the appendix to this report). A report back on this work has been given to the chair of the ICT Reference Group.

3.4 A technical lead will be appointed to consider the statement of requirements and a full outline of the costs of developing the system will then be reported back to the Chief Democratic Services Officer. It is the intention of officers to work closely with both the ICT Reference Group and MMC in determining whether a system represents value for money and should be pursued.

3.5 Finally, the consequences of the ICE project – which is explained below – have some far reaching implications for elected members and the way they work. These consequences may make the development of a casework system more of a priority both for Elected Members and for officers. All these considerations will be taken into account when a decision is reached.

Implementing the Collaboration Environment (ICE)

- 3.6 The Applications Infrastructure Report was presented to the Executive Board on the 16th April 2008; this report recommended that the Council extend its existing agreement with Microsoft to establish a strategic framework contract with them. The Implementing the Collaboration Environment project is the first piece of work originating from this extended agreement.

What ICE Means

- 3.7 The Council Business Plan for 2008-2011 aims towards Leeds City Council being a '...strong culture of one council'. It states 'In order to achieve this we will need to embrace new ways of working, make best use of technology, innovate and collaborate, continuously improve and deliver real customer focus.' The Business Plan recognises ICT as a key enabler in meeting the one council vision.
- 3.8 To meet the Council Business Plan requirements, ICT has embarked on a Collaboration Project and is working with the Information Knowledge Management team, key officers across the council and Microsoft to lay the foundations for the new ways of working. Implementing the Collaboration Environment, or ICE for short is the first phase of the Collaboration Project.
- 3.9 Presented to the Executive Board on the 16th April 2008, the project has been underway since June 2008.
- 3.10 Implementing the Collaboration Environment will provide the platform for both Members of the Council and officers to work more closely together and to implement the following features. Some of these features will be delivered in the ICE project and some in subsequent phases of the Collaboration Project as aligned with the Council Business Plan aims:

Email Services: - The ability to compose, send, store, and receive emails.

Calendar Services: - A digital calendar with the ability to schedule meetings and events, displaying the available free slot and the schedule for today,

Task Management: - The ability to create and assign tasks to colleagues and produce progress reports

Presence Services: - The ability to determine who is online, their availability status and their preferred communication channel.

Instant Messaging: - The ability to send an instant message to an individual or group, and have an online conversation with them.

Chat Services: - The ability to communicate synchronously with colleagues, with features such as recording the chat, and inviting additional participants.

Web Conferencing Services: - The ability to conduct live meetings or presentations over the Internet, with features to include inviting participants, desktop and application sharing, and recording of conferences to play back in the future.

Profile Management Services (White Pages):- The ability to add personal attributes about you such as, for example, your role, expertise, preferences and interests. Other users will be able to search on this information to find personnel relevant to their requirements.

Personal & Shared Workspace Services:- The ability to create personal and shared collaboration areas where users can add/remove/view documents, add members, assign permissions, and work interactively with each other inside a single web based entity to overcome space and time differentials.

Document Collaboration:- The ability to create and modify documents, incrementally being able to edit, preserving continuity, tracking changes and show an audit trail of activity with a view of implementing an Electronic Document Records Management System in the future.

Notification Services: - The ability to notify a user(s) to the change of status of an event or activity (for example, updates to a document).

Blogs: - The ability for authorised users to create, edit and view web-log (blog) entries.

Wiki: - The ability for users to easily create, edit and link web pages in a collaborative manner

Enterprise Search: - The ability to identify specific content across the enterprise infrastructure to be indexed, searched, and displayed to authorised users.

ICE will see the move from the current Lotus Notes Email and Applications to Microsoft Outlook 2003 and Microsoft SharePoint 2007.

How Will ICE Affect Members

- 3.12 Leeds City Council currently has a support contract with IBM to assist Corporate ICT in resolving issues in the event of an outage in Lotus Notes. During the past 4 years IBM have assisted under the terms of this contract four times. Without this help Lotus Notes outages may not have been resolved and critical data could have been irrecoverable. This support contract expires at the end of this year, the cost for one years renewal would be £500,000. The Director of Resources took the decision that rather than renewing this contract, the money would be better utilised within the ICE project to leverage more efficiencies and benefits.

- 3.13 Once the contract has expired there will be no support from IBM and there are no 3rd Party companies that can provide equivalent support more cheaply. This means if there is an outage affecting Lotus Notes that Corporate ICT cannot resolve, email may be unavailable for a long period of time and critical data could be lost costing the Council a large amount of money. To avoid this situation all Council Members and staff will need to move from Lotus Notes email to Microsoft Outlook by October 31st this year.
- 3.14 The date for Members to move to Outlook has not yet been decided however the date will be arranged to ensure the least amount of disruption will be experienced and it will be in line with the move for Democratic Services. (Group Support Office staff will be transferred first to ensure that the maximum amount of support is available to Members during the transition)
- 3.15 As mentioned previously, the move to Microsoft Outlook & SharePoint provides many new ways of working; however one limitation of Outlook is the maximum size for email accounts. To provide alternatives and workarounds to this limitation Corporate ICT are working with Microsoft and the Group Support Offices, however work will have to be undertaken by some Council Members to reduce the size their mail files before the move, included in this is to provide new ways of working to ensure mail file sizes can be proactively managed in the future.
- 3.16 Training will be offered to Members in the use of Microsoft Outlook, this will include how to use the Outlook on day one and best practice/re-education training to get the best use out of Outlook. This training can be offered in a variety of ways including One-To-One training sessions, workshops, drop in sessions, classroom based training and computer based training.

Next Steps

- 3.17 This paper is intended to provide members with an update on progress, and to make Group Whips aware of some of the main ICT issues and challenges which will face us in the future.
- 3.18 To manage and mitigate these challenges it is proposed to take the following steps:
- A final decision on the Casework Management System will be taken and discussed with both the Members ICT Reference Group and MMC. This decision will be informed by the comments in paragraph 3.15 of this report that:

“A direct result of this change (from Lotus Notes to Microsoft Outlook) is an increased need to provide new ways of working to ensure mail file sizes can be proactively managed in the future.”

Members have previously expressed a desire to see a full working demonstration of the casework system before any commitment is made, this is supported by officers. However, there will be potentially significant financial implications in developing a working demonstration. This decision will be carefully considered. Producing a demonstration for members remains an aspiration.

- A list of all Elected Members who may be affected by reduce mail box sizes will be circulated to whips.
- Officers from Democratic Services will continue to meet with Corporate ICT officers and the Members ICT Reference Group to provide alternatives
- A full report on the implications of the ICE project will be produced in conjunction with the Members ICT Reference Group for the MMC meeting in May this year. This report will contain information about what training will be provided for members and what support will be provided. As well as explaining how changes will be communicated and how elected members will be engaged in the process. In addition the report will provide an update on developments with respect to a Casework ICT system.

4.0 Implications For Council Policy And Governance

4.1 None

5.0 Legal And Resource Implications

5.1 Developing a Casework System will have considerable resource and structural implications for Democratic Services and specifically the Group Offices.

5.2 No resources are currently available for this project and any funding would be subject to a successful bid and would have to be considered alongside all other priorities

6.0 Conclusions

6.1 Good progress has been made with regard to the development of an ICT casework management system for members. This work has been conducted by both members and officers and hopefully provides a “best practice” model for future ICT projects which effect elected members. Officers are however conscious that it is important to now reach a speedy conclusion to this project.

6.2 The ICE project is an exciting corporate project which offers a number of important corporate benefits for the Council, not least of which is greater value for money. However, this project does mean changes to way in which Elected Members work, and may require significant flexibility and may not be greeted enthusiastically by all members.

6.3 The move from Lotus Notes email to Microsoft Outlook will happen by October 31st and cannot be negotiated.

6.4 Officers are aware of the potential impact and disruption this may cause, and it is with this in mind that the Members ICT Reference Group have already been engaged, that this report has been written and that further work is planned. Hopefully the lessons learnt following the ICT upgrade project and in working with elected members in the ICT Reference Group will enable the views and priorities of elected members to be heard and acted upon during the implementation of this project.

7.0 Recommendations

- 7.1 Members are asked to consider the contents of this report.
- 7.2 Members are asked to approve the extended role of the Members ICT Reference Group as discussed in section 2.0.
- 7.3 Members are asked to approve the next steps as outlined in paragraph 3.18.

Small Projects Approval Board

Roles and Responsibilities:

- To ensure implementation of request does not conflict with ICT roadmap / technical blueprint
- To ensure security / stability of ICT infrastructure is not compromised by the change
- To advise on whether appropriate resources are available to implement solution within required timescales
- To provide advice / justification / alternatives on any requests it feels ICT are unable to fulfill
- To advise on ICT best practice
- To ensure all appropriate technical considerations are being made
- To advise on best course of action in order to provide most appropriate, cost-effective solution to customer
- To advise on alternate solutions already in place that meet stated business requirements
- To raise awareness of high priority / urgent requests and ensure support
- To provide Resource Managers information on resource requirements to enable capacity planning