



## Report of the Chief Democratic Services Officer and the Chief Officer (ICT)

### Member Management Committee

Date: 13<sup>th</sup> October 2009

### Subject: Members Casework Management Solution

<p><b>Electoral Wards Affected:</b></p>          <input type="checkbox"/> Ward Members consulted (referred to in report)	<p><b>Specific Implications For:</b></p> <p>Equality and Diversity <input type="checkbox"/></p> <p>Community Cohesion <input type="checkbox"/></p> <p>Narrowing the Gap <input type="checkbox"/></p>
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## 1.0 Purpose Of This Report

1.1 The purpose of this report is to provide an update on the progress of the project to deliver a Casework Management solution to Members

## 2.0 Background Information

2.1 Members may recall that at the meeting in May, it was reported that in order to meet the agreed timescales of delivering a Case Management solution by the end of the year, the recommended way forward was to appoint a Project Manager to undertake a feasibility study and develop a business case to access funding for the project and that a formal Project Board be established to manage the project under the Council's Delivering Successful Change framework.

2.2 The Project Brief which was established in conjunction with the Members ICT Reference Group recommended an incremental development approach focusing on the core requirements of a facility to:

- o set reminder dates for pieces of casework
- o alert members to overdue responses
- o notify members when cases need to be resolved
- o provide a repository for the electronic storage of associated case documents.

2.3 It was also recognised that in order for the solution to be "fit for purpose" and for it to be adopted by the largest possible number of members, the project team needed to work closely with the ICT Reference Group to capture those elements of a case work management solution which members would find most useful. Furthermore it was understood that the "look and feel" of the solution were equally important as the technical aspect of the development.

### **3.0 Main Issues**

- 3.1 The Business Case for the Project was approved by the ICT Management Board at the end of June 09.
- 3.2 The project team proposed that the delivery of the solution was undertaken using an approach known as Agile Development. This allows the functionality to be developed, built, assessed by users and delivered in small chunks over a rolling four weekly development cycle. This allows the customer greater flexibility to control what is built and the order in which it is built and then released for use.
- 3.3 A Requirements Gathering exercise was completed and a Statement of Requirements produced and signed-off by the Members ICT Reference Group on 3rd August 2009.
- 3.4 A prioritisation workshop was held on 10th August to identify which elements of the Statement of Requirements needed to be developed first.
- 3.5 A demonstration of the system build to date was provided to the Reference Group on 7th September. One of the recommendations of the Group was to gain input from other members who had experience of using Case Management applications.
- 3.6 The ICT Reference Group suggested members who could provide this additional input and this resulted in a second demonstration of the system on 18th September 2009.
- 3.7 Work on developing the system continues with further demonstrations to the ICT Reference Group scheduled for 2nd and 30th October.
- 3.8 A pilot of the Casework Management solution by members of the ICT Reference Group is planned to take place during November.
- 3.9 Work on developing the approach to training is underway.
- 3.10 The project is currently on course to meet the requirement to deliver a Casework Management solution for Members by the end of December.

### **4.0 Implications For Council Policy And Governance**

- 4.1 There are no implications for Council Policy and Governance.

### **5.0 Legal And Resource Implications**

- 5.1 A project team has been established to develop a casework management solution for Members using Microsoft Sharepoint. The use of this development tool is in line with the technological direction of travel of the Council. The requirements of this Case Management system and the solutions developed are likely to be reused for other developments in Sharepoint in the future.
- 5.2 A bid for funding of £59,880 was approved by the ICT Management Board to facilitate the development of the technical solution to assist elected members in managing their casework. This funding is for the officer time required to develop and deliver the solution. There are no external costs or licensing implications associated with the project.

5.3 The project will identify ongoing costs with respect to the support and maintenance of the application. Such costs will be met on an annual basis by Democratic Services.

## **6.0 Conclusions**

6.1 The project to deliver a technical solution to support elected members in the management of their casework is progressing according to plan and will be delivered by the end of the year.

## **7.0 Recommendations**

7.1 Members are asked to note the contents of this report with respect to the progress of the project to deliver a Casework Management solution.

## **Background Papers**

Report to Member Management Committee May 2009