
Decision Maker: EXECUTIVE

Date: 22 May 2024

Decision Type: Non-Urgent Executive Non-Key

Title: CRM REPLACEMENT CAPITAL PROJECT – CRM & WEBSITE REDESIGN CLOSURE REPORT AND WEBSITE PHASE 2 OPTIONS

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Ward: All

1. REASON FOR REPORT

- 1.1 This report provides an update on the CRM replacement capital programme including a scheme closure report on the completed software implementation and the completed redesign of the Council's public facing website.
- 1.2 This report also seeks Member's approval to progress the complimentary scheme to enhance the My Account features of the website including the personalisation and single sign on initiatives outlined in the report.

2. RECOMMENDATION(S)

- 2.1 Under the CRM capital programme, note the completion of the software implementation and website redesign upgrade project of a value of £491k leaving a remaining value of £270k allocated to this programme.
- 2.2 Approve that the £270k underspend from the capital programme can be realigned to fund the complimentary Phase 2 website 'My Account' enhancement initiatives as set out in the Liberata proposal. This work will be undertaken through the Council's existing provider's CCN process for Liberata as set out in section 10 of this report. Total cost estimates for the project are set out in appendix 1 of the Part 2 report.
- 2.3 Approve delegated authority to the Assistant Director of Customer Services to spend the £270K budget. This will include the purchase of technology and the setting up of any ongoing support contracts which will be procured under a variation agreement to the existing technology providers for the provision of additional services as part of the existing solution and contracts. Further details are set out in appendix 1 of the Part 2 report.

Impact on Vulnerable Adults and Children

1. Summary of Impact: An Equality Impact Assessment indicates that ongoing support for vulnerable adults and children will be provided by Customer Service by phone and face to face for those unable to access digital services. For those unable to visit or phone us, this proposal will enhance the range of self-service options.
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Transformation Policy

1. Policy Status: Existing Policy
2. Making Bromley Even Better Priority:
 - To manage our resources well, providing value for money, and efficient and effective services for Bromley's residents.
 - Exploit the benefits of digitalisation.
 - Effectively manage the collection of Council Tax and Business Rates.
 - Commission services intelligently and integrate services where it makes sense to do so.
 - Explore and implement innovation in service delivery and design.

Transformation Objectives:

- Effective resident engagement.
 - Flexibility, independence, and choice in service delivery.
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Financial (As set out in Appendix 1 of the Part 2 report)

1. Cost of proposal: £270k (Capital)
 2. Ongoing costs: £7.5k (revenue)
 3. Budget head/performance centre: Customer Service IT System Replacement
 4. Total current budget for this head: £270k
 5. Source of funding: Capital & Revenue
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Personnel

1. Number of staff (current and additional): 1
 2. If from existing staff resources, number of staff hours: 36 per week
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Legal

1. Legal Requirement: Non-Statutory – Government Guidance
 2. Call-in: Applicable
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Procurement

1. Summary of Procurement Implications: Please see section 15.
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Property

1. Summary of Property Implications: N/A
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Carbon Reduction and Social Value

1. Summary of Carbon Reduction/Sustainability Implications:

The My Bromley account holds 139k accounts with 46,177 subscribers to e-billing, reducing paper production and postal service reliance. Officers continue to work with Liberata on projects to increase back-office automation and further reduce paper volumes.

Impact on the Local Economy

1. 24/7 website available for customers to pay for services online.

Impact on Health and Wellbeing:

1. Summary of Health and Wellbeing Implications: N/A

Customer Impact

1. Estimated number of users or customers (current and projected): 2,000 visitors, 350,000 phone calls, 20,000 e-mails and 8 million web visits annually.

Ward Councillor Views

1. Have Ward Councillors been asked for comments? N/A
2. Summary of Ward Councillors comments: N/A

3. CLOSURE REPORT COMMENTRY

CRM Replacement Project

- 3.1 In October 2019, Executive (Report CEO19001A) agreed to upgrade the Council's Customer Relationship Management System (CRM) to the Jadu CXM system on the outcome of the BT options appraisal and recommendation review report. The recommended and selected option, Jadu CXM, was chosen due to the enhanced case management functionality and the already obtained Jadu suite of systems that the Council currently uses for website content management, web forms and the e-pay service. CXM is a further module of the software from the provider and is a configurable and flexible case management system that can be integrated with other key line of business systems and aligns to the corporate website software.
- 3.2 BT were commissioned to carry out the implementation of the CXM system including implementing all associated integration software alongside the Bromley Project Team. Work was successfully completed in the summer of 2021 and the system went live on the 30th of June, two weeks earlier than its original deadline. To date, the CXM system including the integration middleware tool has been effectively running for the Contact Centre and back-end service areas to receive and action service requests. The project has since been closed and the decommissioning of the old CRM system has taken place.

Website Redesign and Upgrade Project

- 3.3 In March 2021, Executive (Report FSD21021) agreed that a sum of £150k was set aside to meet the cost of the changes to the Council's website, funded from the 2020/21 Central Contingency Sum. This was due to the outcome of the review of the Council's website which was conducted by the Council's Customer Service's service delivery partner (Liberata) who manage and edit the public website (www.bromley.gov.uk). The review's findings concluded that the website was visually and technically tired in terms of its design templates, whilst being fragmented with a number of sub-sites. The Jadu software running Bromley's public facing website had been in place for nine years and had been regularly upgraded through the Council's system support contract. However, the design itself had seen only minor tweaks in that period with the basic structure of the website remaining the same, as had the look and feel of the technology that sits behind the web pages. Technologically, things had moved on over the years with the use of mobile technology which Liberata felt was not reflected in the current structure and functionality of the existing website.
- 3.4 Therefore, a full re-design process was undertaken driven by customer engagement, service-based representative engagement and using behavioural analytics tools to arrive to an evidence led final design. The website was successfully redesigned and upgraded to the Jadu Photon platform in June 2022 and has benefited from the following improvements:
- Enhanced features and functionality.
 - More robust, reliable and with improved and modernised templates, the new site has already improved accessibility ratings over the old site.
 - Security and search engine optimisation improvements of the site whilst offering a long-term solution to managing templates on the Council's sub-sites.
 - The Council's branding is better reflected across the new site, and all site content was reviewed by service area specialists before going live, to ensure customers had access to the most relevant and up to date information.
 - Customers now have a range of options to find information, which includes site search features, a full range of 'simple to recognise' service buttons, top tasks services links, and a comprehensive A – Z.
 - The new software supports any design changes required as a result of broader personalisation of pages and the integration opportunities from Jadu's CXM product to enhance the overall customer experience.
 - Safeguard long term technical support and unifies the template technology across all Jadu products in place with the provider.
 - Benefits other customer facing systems using the website templates.

- The site and content have also achieved the Crystal Mark Plain English standards.

3.5 In September 2021, Executive (Report CSD21097) agreed to a complimentary scheme under the website redesign and upgrade project, to migrate the website from the former software hosting provider to Jadu’s own hosting managed platform at an estimated cost of £175k. This work brought a range of benefits and was carried out to enhance the performance of the website on Jadu’s own hosting managed platform and servers. This work achieved the following:

- Cost reduction in both the running cost of the hosting contract and an efficiency for routine patching as less in-house resources are now required to patch the solution which is part of Jadu’s contractual obligations.
- Less downtime for the site, with an enhanced resiliency level and fewer large upgrades required.
- Enhanced security with a DDOS (Distributed Denial of Service) mitigation package. As websites are increasingly a target for malicious activity the DDoS mitigation solution helps to deter hacking and other forms of attack by detecting and blocking threats.
- By moving to Jadu’s hosted platform, this also favoured the Council’s IT strategy which states where possible, vendor hosted solutions should be used.

3.6 This work has now been completed as part of the project and the former hosting environment has been successfully decommissioned.

Final Scheme Costs:

3.7 The below shows the overall cost breakdown for the projects:

	£'000	£'000
Capital		
Budget Approved	761	
CRM replacement software, decommissioning/disposal	-283	
Web redesign & server relocation costs, phase 2 options	-208	
Balance remaining	270	
Revenue (FY 20/21)		
Budget Approved		150
Replacement web software, contractor & hosting costs		-120
Balance remaining		30

CRM Replacement Scheme Costs

3.8 As detailed in the last update report, the CRM replacement project came in under budget. The total budget for the scheme was £761k. The total CRM replacement scheme expenditure came to 283k. This has been achieved by officers with a number of scope changes that are highlighted below:

3.8.1 BT’s initial implementation costs outlined in their proposal were based on non-TUPE rates for the engineers that were due to work on the project. However, due to the nature of the project and the resources available at the time officers were actually able to secure BT TUPE engineers and therefore third-party staff costs were significantly reduced.

3.8.2 Result of the Environmental Services Commissioning:

At the time of BT producing the CRM Review report, the Council was mid-way through the Environmental Commissioning project. It was recognised at the time there would be a significant impact on the CRM replacement project depending on the outcome of the commissioning work and contract mobilisation. The most significant factors were how the services would breakdown across the different service lots and the potential number of organisations involved and what their technical capabilities were. As a consequence of such unknown factors the proposed solution, and therefore associated costs, provided in the report were based on the likelihood of the most complex outcome. When the actual contract was awarded the outcome was less complex and in the early stages of the Environmental Services transition work officers were able to simplify a number of data processes and consequently reduce cost.

3.8.3 Maturity of the Jadu product:

'Out of the Box' features in the Jadu CXM product have 'matured' since the BT CRM Review report was produced and therefore the Council was able to take advantage of these technology advancements. Specifically, the systems integration aspects, previously required a more substantial integration middleware solution, this was not ultimately required, and officers were able to deploy a simplified integration.

3.8.4 Removal of some services requiring the use of CRM:

During the pre-deployment solution analysis work, back-office services were consulted about their data capture in the CRM system. From this officers ascertained that some services were looking at alternative solutions for how they interact with their customers and there was an opportunity to simplify or remove some of the functions being performed by the current CRM system. These are outlined below:

- Waste Services - (Veolia's ECHO system and the aspirational Fix My Street product to be used for the provision of missed collections). With printed waste publications such as tip permits, and waste calendars provided by the CXM product.
- Significant number of legacy forms not required as a consequence of not being used or used so infrequently that an alternative provision was more cost-effective.
- Certain features such as complaint escalations, have been implemented in a different way, due to differences in technologies and therefore reducing complexity.

3.8.5 Fix My Street solution:

Environmental Services deployed the MySociety Fix My Street product to the Contact Centre as the case management system for Streets and Greenspace cases. This was in light of an options appraisal investigation that was undertaken to determine the new emerging functionality that MySociety had created. This emerged after the BT CRM options report was produced and was therefore not included as an option. This new technology linked the FMS front end case management system to the back end 'Confirm' system which Environmental Services staff already use. Therefore, considerably less effort and expenditure were required to deploy this solution to the Contact Centre.

3.8.6 Decommissioning & Archive of the old CRM system:

There were no costs to the project for the decommissioning activities due to the BT contractor undertaking this work as a BAU activity under the current contract. Also, due to Environmental Services deployments of the Fix My Street and ECHO systems, there was no requirement to keep an archiving system as the critical data had already been removed from the system as part of decommissioning process. Therefore, the archiving costs were removed from the scope of the project and a further efficiency made.

Website Redesign and Upgrade Costs

- 3.9 The website redesign and upgrade had a budget of £150k, with a total spend of £120k, leaving an underspend of £30k. This budget was used to fund the Jadu replacement software including contractor and hosting costs.
- 3.10 The migration of the website from the former software hosting provider to Jadu's own hosting managed platform had an estimated cost of £175k. This work came in over budget at £208k. This was due to a number of factors:
- 3.10.1 The software deployment costs came in higher than estimated due to the Directories Manager solution that was hosted in the previous providers platform and needed to be migrated to a new environment. Although this work was originally identified as part of the project, this work was a lot more complex than originally estimated which added extra time and cost to the project.
 - 3.10.2 The website needed a range of custom developments to be recreated and migrated to the new Jadu software. After a series of investigation activities, the Website Team asked if this work could be completed to keep the custom development components that were previously created in the old platform to be migrated to the new platform. This was agreed and implemented as an extra cost to the project and avoided any loss of customer functionality.
 - 3.10.3 As part of the website redesign and upgrade, the project team were also tasked to undertake a short options appraisal for any potential website phase 2 initiatives. This work was undertaken with the help of BT at an extra cost to the project which is referenced in section 4.1 of this report.
- 3.11 The overall project combining both elements have resulted in an underspend value of £270k for capital and £30k for revenue.

Scheme Objectives:

- 3.12 The objectives of the scheme were to:
- Upgrade the Council's Customer Relationship Management System (CRM) to the Jadu CXM system on the outcome of the BT options appraisal and recommendation review report.
 - Redesign and upgrade the public facing website technology due to the visually and technically tired design templates.
 - Migrate the website technology from the former software hosting provider to Jadu's own hosting managed platform.

Scheme Outcomes & Assessment of Success:

- 3.13 All three objectives of the scheme were successfully met. The upgraded systems contribute effectively to the Council's customer service provision and have supported significant increases in online contact since the Covid pandemic and have been extended to wider use across the organisation.
- 3.14 Since going live with the CXM technology, service areas have taken advantage of the case management system and delivered efficient processing through the technology. A few examples of service area use:
- I. Public Protection for logging of customer cases which are integrated into the back-office system.
 - II. Education services for the 'education gateway' process which has greatly improved their forms processing.
 - III. Housing services for the 'Home for Ukraine' scheme and booking visits for hosts and guests.
 - IV. Churchill Court staff visits booking system.

- 3.15 The website redesign and upgrade has seen a vast improvement in functionality and is visually more appealing when searching and navigating through the site. The new Jadu Photon platform also provides an improved underlying structure for the Bromley website, which addresses some recently introduced accessibility requirements that the previous version of the platform was unable to address.
- 3.16 The successful migration of the hosting solution to Jadu has also achieved the following:
- Cost reduction in both the running cost of the hosting contract and an efficiency for routine patching as less in-house resources are now required to patch the solution which is part of Jadu's contractual obligations.
 - Less downtime for the site, with an enhanced resiliency level and fewer large upgrades required.
 - Enhanced security with a DDOS (Distributed Denial of Service) mitigation package. As websites are increasingly a target for malicious activity the DDoS mitigation solution helps to deter hacking and other forms of attack by detecting and blocking threats.
 - By moving to Jadu's hosted platform, this also favoured the Council's IT strategy which states where possible, vendor hosted solutions should be used.

Outstanding Issues:

- 3.17 There are no outstanding issues arising from this scheme. However, as part of the ongoing work to evolve and manage the website, the contractor will be utilising the search tool and reviewing other optimisation activities, continuing to improve the search functionality, and reviewing site content as part of the twice-yearly review that takes place.

End of closure report.

4. WEBSITE SELF-SERVICE FUNCTIONALITY AND MY BROMLEY ACCOUNT PHASE 2 PROPOSAL COMMENTRY

- 4.1 As reported to Members at Executive in September 2021 (Report No CSD21097), the project team were also tasked to consider future options (phase 2) of the project once the redesign work had been completed. To conduct this analysis, the project team worked alongside BT to consider if and how the current Jadu My Account technology could be utilised to provide a one touch digital access point for customers to conduct their business with the Council.
- 4.2 The outcome of this analysis highlighted that the Jadu My Account technology could be used to further enhance the customers experience when conducting business with the Council. Jadu's My Account technology has the ability for residents to have a broader more personalised view of their services and online interactions with the Council. There is also the ability to self-serve and track many key functions from a single homepage. Essentially, creating a one-stop-shop area for residents and customers to save & return forms, including tracking form progress, and to be presented with key geographical items of information within their local area such as events and news items.
- 4.3 As part of this analysis work, other key website enhancements were identified including the use of 'single sign on' for other Council portals. This would enable a single login credential to be able to gain access to multiple services/platforms in one place. The advantages of this would draw more customers to the Council's online offering and reduce traditional methods of expensive contact with the Council. This has been successfully deployed in other Councils using the Jadu My Account.
- 4.4 Following the phase 2 BT analysis work, the Customer Services Delivery Partner (Liberata) were tasked to review the outcome of this analysis and review each of the phase 2 initiatives in more detail.

4.5 Liberata have since developed a proposal for the Council to consider. In summary, the following key areas have been identified by Liberata for the Council to improve their online offering further for Bromley residents and customers:

My Bromley Account Development:

- 4.6 The current 'My Bromley Account' portal sits outside of the main Jadu website on Capita's OneDigital technology and focusses mainly on the Council Tax and Benefits service. The aim of this initiative is to develop the 'My Bromley Account' to present a wider, unified view of all customer transactions and business with the Council, not solely focussing on the Council Tax and Benefits service.
- 4.7 Due to the already invested benefits of Jadu CXM, the proposal also enables a connection between the case management software and the Jadu portal technology to allow two-way updates to be sent from the customer to the service and back for form updates. This advantage would allow the customer to be able to interact online via our forms software and receive updates from the service areas rather than having to phone or email the Council for an update on a service request.
- 4.8 Bromley's online provision is not just delivered through the Jadu website and Capita OneDigital portal, but also has a number of third-party sub-sites, providing specialist online functionality. Some of these sites deliver functionality for high volume, popular services, such as waste services, parking, and reporting street problems. Therefore, the ability to bring back data from these other third-party sites and portals into the Jadu pages would be hugely beneficial. This workstream would be subject to further requirements discussions with the individual providers and does not form part of this report recommendation.
- 4.9 Key Deliverables to the proposal:
- Development of the Jadu My Account
 - Integration with the Capita My Bromley Account
 - Online form status, feedback, and updates
 - Holistic and personalised view of services
 - Ability to self service via My Account home page

Develop Single Sign On:

- 4.10 As mentioned above, the Council's online provision is not just delivered through the core website, but also through a number of third-party sub-sites. Each of these individual sub-sites generally have their own customer registration system which requires a separate registration login and password for each site. The principle aim of this initiative is to integrate the main high hitting customer sub-sites to a single sign on solution which allows the customer to use one set of login credentials. Through the My Account technology, the customer would be able to see and access their accounts in one place reducing the need to remember various login credentials and time-consuming password resets.
- 4.11 The benefits of achieving a single sign on solution are:
- Streamlines and enhances digital customer experience.
 - It saves time and costs from automation, integration, and password resets.
 - Improves and increases customer interactions with the Bromley website.
 - Simplifies integration with back-office teams and joins up access to services.
- 4.12 As part of this exercise to make the Jadu My Account the new one-touch digital portal on the website, the first stage is a single-sign on solution to be enabled between the current Capita My Bromley Account portal and the new Jadu My Account. Once the accounts have been migrated, the customer will likely be required to reset their password as a security requirement before accessing their new My Account.

This would allow the two accounts to become connected and the customer to have a seamless experience for any future logins.

Broaden Personalisation:

- 4.13 In order to encourage customers to return to the My Account and keep using it for transactional purposes, the Council could adopt a range of personalisation options to keep the customer up to date with relevant information personalised to them and their address.
- 4.14 The benefits of achieving a personalised My Account:
- Implementing geographical informational maps that centre around the customers address presenting the customer with a tailored view to their relevant information such as events, news, local interests, bin collection information.
 - Presenting a customer's log in page with their recent form and service requests. The customer can view progress of service requests without having to contact the Council.
 - Assisted pre-filled forms for address and contact details. Allowing the customer to return to a previously part-completed form.
 - Promotional reminders and broadcasting of messages.
 - Available 24/7.

Digitally Excluded Customers:

- 4.15 It is important to note that traditional methods of contact with the Council such as telephone or face to face reception services will remain in place for those customers who need to interact in this manner. Traditional methods of contact will not be affected by this enhancement to web services.
- 4.16 Further to this, support for customers wishing to learn to use online services is available by visiting the Civic Centre Reception which provides devices for customer use and guidance by staff members if requested. The Civic Centre also supports a free Wi-Fi service for customers who prefer to use their own devices, and staff are available to assist them. These facilities will be transferred to the new building. Similarly, the Bromley library service also have computers for customers to use onsite and the library service also supports and delivers digital skills training for residents.

5. SUMMARY OF BUSINESS CASE

- 5.1 To summarise the above, the project will include:
- 5.2 Development of the My Bromley Account registration portal to widen its focus to include all Council services where possible. The project will also improve functionality of the website, by enabling form auto-filling, the ability to save and return to incomplete online forms and tracking, so customers can self-serve progress updates on service requests that they have submitted.
- 5.3 The introduction of single sign on opportunities with the most visited Council sites and subsites. This will unify the Council's various online registration systems and result in customers' only needing to remember one set of login details to access all Bromley Council services, subject to further requirements with providers and costings.
- 5.4 Personalisation of the website pages to improve customer experience. This will make self-service of information easier and quicker, reduce user journeys and give the ability to display focussed alerts and reminders in the webpages.
- 5.5 Procurement implications are set out in section 10 of the report.

5.6 Estimated costs of the project are set out in appendix 1 of the Part 2 report.

6. OPTIONS APPRAISAL

6.1 It is important to note that this is a complex technical project which requires multiple agencies working collaboratively, therefore it is proposed that there will be a phased approach to delivery as outlined below.

OPTION 1 - (PHASE 2A):

6.2 Agree to implement the Liberata proposal which includes:

6.3 The implementation of the Jadu My Account technology and development of the single sign on with the current My Bromley Account also known as the Council Tax & Benefits portal.

6.4 As well as unifying the sign-on between the Jadu and Capita Portals, this will result in moving the existing My Bromley Account, along with the current account holders from Capita onto the Jadu platform. This process will turn on the Jadu MyAccount feature, which is essential to facilitate further development of personalisation of the website and open the way for the My Bromley Account to embrace a wider range of services.

6.5 Phase 2A will deliver the minimum viable product and importantly provides the necessary technical platform to pave the way for any future developments and enhancements.

OPTION 2 - (PHASE 2A & 2B):

6.6 Agree to implement the Liberata proposal for phase 2A and 2B which includes:

6.7 After completion of Phase 2A, further development of personalisation to the new My Bromley Account. This will include implementing single signs-ons between the Fix My Street and Waste Works portals and the development of generic tools so the web team can apply personalisation features on relevant pages across the website.

6.8 The outlined phased approach allows the Project Team, the Assistant Director of Customer Services and the Director of Human Resources, Customer Services and Public Affairs to agree and approve that the next phase of the project can be progressed in a gateway fashion by assessing the risk and remaining budget of the project before proceeding to the next stage.

OPTION 3:

6.9 Do nothing and return the capital receipts. This will result in no future development to the My Account features on the website.

PREFERRED OPTION

6.10 Option 2 (A&B) is the recommended option as this will allow all of the benefits specified in section 4 of this report. This option will also be overseen by the Assistant Director of Customer Services and the Director of Human Resources, Customer Services and Public Affairs who will agree that the next phase of the project can be progressed in a gateway fashion by assessing the risk and remaining budget of the project before proceeding to the next stage.

7. MARKET CONSIDERATIONS / IMPACT ON LOCAL ECONOMY

- 7.1 The Jadu solution has already been invested in by the Council and is the main system for website content management, forms, and payments. In order to proceed with the My Account activities, the Council would need to invest further into Jadu's available software. Therefore, approaching the market is inappropriate as the additional software cannot be fulfilled by other providers.
- 7.2 Market research has been conducted for other Local Authorities that have developed their Jadu My Account. This includes:
- 7.3 Cherwell Council: The Council have implemented the same approach that Bromley would undertake to create a single sign-on between the Capita technology and the Jadu technology allowing a seamless experience between both accounts.
- 7.4 Broxbourne Borough Council: The Council has seen an increase in digital service uptake since implementing My Account. The platform has enabled the Council to provide 24/7 services to residents, with accessible and easy-to-use digital services. Residents can access services such as Council tax payments, report missed bin collections, and book appointments with the Council via the My Account platform.
- 7.5 Swindon Borough Council: The Council has digitised over 60 processes across 20 service areas using Jadu My Account. The platform has enabled residents to access digital services at their convenience, reducing the need for phone or in-person inquiries. As a result, the Council has seen a significant increase in online transactions.
- 7.6 Harrow Council: The Council has implemented a hyperlocal personalization widget to provide targeted and contextual information to visitors based on their location and behaviour. The platform has enabled the Council to tailor content and services to individual users, providing a personalised experience that increases engagement and satisfaction.
- 7.7 Birmingham City Council: The city's My Account service, known as BRUM Account, has over 500,000 registered users. BRUM Account allows residents to access a wide range of services, including Council tax payments, waste collection calendars, and benefits applications. The platform has been instrumental in driving channel shift, with over 90% of benefits applications now completed online.

8. SOCIAL VALUE, CARBON REDUCTION AND LOCAL / NATIONAL PRIORITIES

- 8.1 The My Bromley account currently holds 139k accounts with 46,177 subscribers to e-billing, reducing paper production and postal service reliance. Officers continue to work with Liberata on projects to increase back-office automation and further reduce paper volumes.

9. STAKEHOLDER ENGAGEMENT

- 9.1 The Customer Services Provider, Liberata, have been in consultation with the Customer Services department and the LBB IT Team to work through the details of the proposal. LBB IT have verified the Liberata proposal and given approval to proceed. Please refer to section 13 of this report for further IT comments.
- 9.2 The Information Management Team have been consulted on the project and the GDPR implications have been listed in section of 13 of this report.
- 9.3 The LBB Revenue & Benefits Team have been consulted on this project.

- 9.4 The Environmental Services lead for Fix My Street and Waste Works has been consulted on the project. Further details will be reviewed and discussed with the service leads at the relevant stage in the project.
- 9.5 The Digital Transformation Board and Chief Officers have both separately been consulted on the Liberata proposal and a presentation was shared for discussion and approval to proceed to Member decision.

10. PROCUREMENT AND PROJECT TIMESCALES AND GOVERNANCE ARRANGEMENTS

- 10.1 Total cost estimates for the project are set out in appendix 1 of the Part 2 report.
- 10.2 The Liberata proposal will be approved through the Council's existing provider CCN process under the Exchequer Services contract.
- 10.3 As documented in the Liberata proposal, there are several one-off costs that have been obtained from our existing suppliers Jadu, Capita and Society Works as set out in appendix 1 of the Part 2 report. In order to move forward with the proposals, approval is required for delegated authority to the Assistant Director of Customer Services to spend the £270K budget. This will include the purchase of technology and the setting up of any ongoing support contracts which will be procured through a compliant route under multiple contract variation agreements with the existing technology providers for the provision of additional services as part of the existing solution and contracts.
- 10.4 As mentioned in 10.3, quotes have been obtained from Jadu, Capita and Society Works in order for the Liberata proposal to be created. Identified in these quotes are annual support fees for the Jadu and Capita developments which can be met from existing Customer Services revenue budgets. Further information on the cost of both annual support fees is set out in appendix 1 of the Part 2 report.

Proposed Contract Period:

- 10.5 Further details of accurate project timeframes will be determined once the project has been initiated and the suppliers can give accurate resourcing dates. However, phase 2A and 2B are collectively estimated to take up to one year from project set up, further scoping, implementation, and delivery of services.
- 10.6 Contract lengths for the technology will be determined to support the existing solution contracts that are already in place with the providers.

Governance Arrangements

- 10.7 Liberata are leading on the project on behalf of Bromley and will be delivering the project management for both phases. A project management representative from LBB Customer Services will work alongside Liberata and will ensure the relevant service leads such as LBB IT, Information Management/GDPR team, Revenue & Benefits service and Environmental Services are invited to Project Board meetings and included in the governance arrangements.
- 10.8 The Assistant Director of Customer Services will be the Project Sponsor and overall decision maker for the project.

11. IMPACT ASSESSMENTS (INCLUDING VULNERABLE ADULTS AND CHILDREN) AND CUSTOMER IMPACT

- 11.1 Currently the Council receives annually 2,000 visitors, 350,000 phone calls, 20,000 e-mails, 8 million web visits and 139,000 My Bromley Account holders. There are over 6,000 pages of information on

Bromley's website with over 260 transactional forms generating around 10,000 service requests per month. 60% of Bromley's customers visit the site using a mobile phone or tablet. With 53% of visitors arriving at the website from search engines, usually directly to the page that interests them via an internet search engine.

- 11.2 During the Covid-19 first and second lockdown the Council has seen a significant increase in customers accessing the website. Pre-Covid, the Council received 4.5 million web visits annually, and post-Covid this number nearly doubled. This data shows that a large majority of customer contact is via online services which highlights the importance of keeping online services relevant and up to date for Bromley's customers.
- 11.3 The Council has also seen a shift in the way that customers want to interact with the Council with nearly 60% of customer contact via digital channels and 40% via traditional channels such as face to face and telephony services, measured from services managed by Customer Services. This continued shift in customer interaction shows an important trend in the way that residents want information and contact with the Council. Customer Services and the Service Delivery Partner are continuing to develop this favoured way of contact which has led to the realisation of benefits and channel shift savings as set out in the Exchequer Services contract.
- 11.4 To support vulnerable residents, services such as face-face reception services and Contact Centre phone operations will still be provided as normal and will not be affected by this enhancement to web services.
- 11.5 Further to this, support for customers wishing to learn to use online services is available by visiting the Civic Centre Reception which provides devices for customer use and guidance by staff members if requested. The Civic Centre also supports a free Wi-Fi service for customers who prefer to use their own devices, and staff are available to assist them. These facilities will be transferred to the new building. Similarly, the Bromley library service also have computers for customers to use onsite and the library service also supports and delivers digital skills training for residents.
- 11.6 This project will not impact vulnerable adults or children because other traditional methods of contact with the Council such as telephone or face to face services will still be in place and provided for those who wish or need to interact in this manner.

12. TRANSFORMATION/POLICY IMPLICATIONS

- 12.1 The Digital Board and Chief Officers have both separately been consulted on the Liberata proposal and a presentation was presented for approval to proceed to Member decision.
- 12.2 This project aligns with the following making Bromley Even Better values:
- To manage our resources well, providing value for money, and efficient and effective services for Bromley's residents.
 - Exploit the benefits of digitalisation.
 - Effectively manage the collection of Council Tax and Business Rates.
 - Commission services intelligently and integrate services where it makes sense to do so.
 - Explore and implement innovation in service delivery and design.
- 12.3 This project also aligns to the following Transformation objectives:
- Effective resident engagement.
 - Flexibility, independence, and choice in service delivery.

13. IT AND GDPR CONSIDERATIONS

- 13.1 The project team have worked closely with the LBB D&IT service, and it's understood that the systems affected by the proposed changes are hosted with the vendors (Jadu, Capita) and there is little to no direct interaction with the LBB IT supported infrastructure.
- 13.2 It should be noted there are several other large IT oriented projects underway within LBB at present that are demanding significant resource time from the D&IT service. This may have implications on IT projects being undertaken as key resources may have less availability to support services and it may therefore be necessary to consider additional resources to be brought in to provide IT support for the project.
- 13.3 The Council, as part of its on-going commitment and sustaining a progressive approach to data protection and information management, requires the following be considered and evidenced:
- All systems hosted by the provider or their subcontractors, and used to access, store and facilitate the migration of Council data must have adequate information security and management tools and processes in place.
 - Providers must be able to evidence adequate compliance of the Data Protection Act 2018 and UK GDPR including, but not limited to; policies, training, register of processing activities and the appointment of a data protection officer where required.
 - Contractually SLA's must be agreed to for breach notification and reporting.
 - Data Sovereignty – providers that use hosted or cloud-based services must ensure they are in UK Data Centres.
 - Exit strategy: explicit determination of what happens to the information collected and stored by providers after the contract finishes must be identified, documented and actioned as appropriate.
- 13.4 Although the information being processed is not changing, it would be advantageous that the Council revisits the data protection impact assessment to ensure that any subsequent is undertaken following privacy by design and be default principles.

14. STRATEGIC PROPERTY CONSIDERATIONS

- 14.1 Not applicable.

15. PROCUREMENT CONSIDERATIONS

- 15.1 The report seeks variations to include the purchase of technology and the setting up of any ongoing support contracts with the existing technology providers for the provision of additional services as part of the existing solution and contracts.
- 15.2 Any Procurements arising from this should follow the appropriate process in conjunction with the Council's Contract Procedure Rules
- 15.3 Following Approval, the variation must be applied via a suitable Change Control Notice, or similar, agreed with the Providers.
- 15.4 The actions identified in this report are provided for within the Council's Contract Procedure Rules, and the proposed actions can be completed in compliance with their content.

16. FINANCIAL CONSIDERATIONS

- 16.1 The report requests approval to utilise the remaining £270k capital budget from the Customer Services IT System replacement project to fund Phase Website Enhancement project.

16.2 The preferred option, is option 2, which encompasses Phase 2A and 2B. This option will be overseen by the Assistant Director of Customer Services and the Director of Human Resources, Customer Services and Public Affairs who will agree that the next phase of the project can be progressed in a gateway report by assessing the risk and remaining budget of the project before proceeding to the next stage.

16.3 There is sufficient remaining budget within the capital programme to fund Option 2 as detailed in section 6.6 of the report, with a small ongoing revenue cost for annual support fees of £7.5k that can be met within existing budgets.

17. PERSONNEL CONSIDERATIONS

17.1 Not applicable.

18. LEGAL CONSIDERATIONS

18.1 This report requests Members approve expenditure of £270k to fund the complimentary Phase 2 website 'My Account' enhancement initiatives and to purchase technology and setting up of any ongoing support contracts as detailed in Appendix 1 of the Part 2 report.

18.2 This spend will be made through change control notices and variation procedures with existing technology providers for the provision of additional services as part of the existing solution and contract. There are therefore no material changes to the contracts but permitted changes under the contracts that can be made in accord with procurement law and practice.

19. IMPACT ON HEALTH AND WELLBEING

19.1 Not applicable.

20. WARD COUNCILLOR VIEWS

20.1 Not applicable.

Non-Applicable Headings:	Strategic Property Considerations Personnel Considerations Impact on Health and Wellbeing Ward Councilor Views
Background Documents: (Access via Contact Officer)	N/A