

# **CHESHIRE EAST COUNCIL CHESHIRE WEST & CHESTER COUNCIL**

## **REPORT TO: SHARED SERVICES JOINT COMMITTEE**

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**Date of Meeting:** 2 October 2015

**Report of:** Mark Wynn – Cheshire West and Chester and Peter Bates – Cheshire East

**Subject/Title:** CoSocius Service reviews

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### **1.0 Report Summary**

- 1.1 The purpose of this report is to update Members on the progress being made in the delivery of the Service Review programme which Members approved at the last meeting of this Committee on 27 February 2015.
- 1.2 This report will be accompanied by a summary presentation, which highlights key messages to Members, and is supported by the detail which follows in this document.

### **2.0 Decisions Requested**

Members are asked to:

- 2.1 Note the progress in delivery of the transactional services benchmarking review;
- 2.2 Note the progress to date with the series of service reviews underway and the opportunities for collaboration and sharing across both Councils identified so far; and
- 2.3 Approve the change in scope and associated re-phasing of delivery deadlines for two of the service review areas.

### **3.0 Reasons for Recommendations**

- 3.1 To update Members on the progress to date in delivery of the Service Review programme and the direction of travel for each review subject at the time of reporting.

### **4.0 Report Background**

- 4.1 This committee at its meeting on 27 February 2015 approved a programme of work to review the delivery of applications and services by CoSocius to the two Councils. Two significant components of this review programme were:

- The completion of a benchmarking review of the transactional services (HR contract management and payroll, payments and income), to ensure prices are in line with industry standards; and
- The completion of a series of “service reviews”, focussing on the key applications and systems provided by CoSocius to the Councils, assessing the extent to which current and future service offerings meet the strategic requirements of the Councils, both as CoSocius customers and shareholders.

4.2 This report will provide an update to Members on the key themes and issues arising from the work to date, and an indication of the direction of travel for each area of review, ahead of more formal recommendations to Members as the programme progresses.

## **5.0 BENCHMARKING OF TRANSACTIONAL SERVICES**

5.1 An independent third party, Waterstons Ltd, have been appointed to carry out the benchmarking exercise approved by Members at the last Committee meeting. Fieldwork has taken place during September 2015. Waterstons have undertaken a “request for quotation” exercise to determine what other comparable providers in the market would seek to charge for a similar set of services as those provided to date by CoSocius to the Councils.

5.2 A verbal update on progress will be provided to the Committee based on available information at that time. Final results and a benchmarking report are expected during October 2015, and will be reported to Members at the November Joint Committee, along with proposals for actions to be taken based on the conclusions of the review.

## **6.0 SERVICE REVIEWS – PROGRESS UPDATE**

6.1 The programme of service reviews approved by Members at the previous Committee is set out below, showing proportion of total application support spend covered by each review:

Tranche 1 – April '15 to December '15	Tranche 2 – October '15 to May '16
Enterprise Business Systems (50%)	Revenues and Benefits (5%)
Health & Social Care (Adults & Children) (3%)	Cash Receipting and Income Management (2%)
End User Computing (desktop, mobile, etc) (11%)	Highways (1%)
Geographic Information Systems (3%)	Children and Young Persons (1%)
Business Intelligence and Reporting (2%)	Document Management (1%)
Schools Information System (0%)	Elections (1%)
Resource Planning (Homecare) (1%)	Environmental Health (1%)
Customer Service (5%)	Transport (1%)
Planning and Building Control (3%)	
CoSocius cost associated with Tranche 1	CoSocius cost associated with Tranche 2
£5.1m	£0.83m

- 6.2 The scope each review previously agreed with Committee is outlined in Appendix A to this report.
- 6.3 A five stage service review methodology was approved by the Committee. The methodology is outlined for reference at Appendix B to this report.
- 6.4 Progress against each Tranche 1 review is outlined below.

## **Enterprise Business Systems**

- 6.5 The Councils' and CoSocius' "baseline and future vision" strategy statements (arising from Phases 1 and 2 of the service review methodology) were due for release in mid-September. At the time of reporting the Council deliverable is awaiting some additional information around specific requirements relating to HR / Payroll and Finance but is largely complete and has been shared with key stakeholders in draft.
- 6.6 The CoSocius proposal has not yet been issued at the time of reporting. The scope of the CoSocius strategy will be broad, covering transactional service delivery requirements which are currently underpinned by the Oracle ERP system, their needs as an ASDV in their own right, and an application delivery and support proposal which would meet the Council's needs (and those of their subsidiaries) but also provide a platform for commercial expansion.
- 6.7 A set of ERP Principles ("Enterprise Resource Planning") have been discussed with Cheshire East, Cheshire West and Chester and CoSocius at ERP Review Board meetings and a final version has been agreed. These will be used to help to select an appropriate solution and to make informed decisions about which solutions to discount from the process.
- 6.8 The Service Specification arising from the initial phases of the approach is due by the end of September. Early market engagement analysis (ahead of formal soft market testing) is underway, with key representatives from Cheshire East and Cheshire West and Chester identified for reference site evaluations.
- 6.9 A clear trend has been identified through this early market engagement, with a shift in the public sector away from "enterprise class" Tier 1 ERP solutions (such as SAP and Oracle) to simpler, less costly "business class" Tier 2 ERP solutions.
- 6.10 At the next Committee meeting, it is expected that the review will have developed a clearer view of the suitability of Tier 2 solutions to meet the Councils' requirements. Tier 1 solutions have not yet been ruled out. It is also expected that a clearer view will have emerged on the need for a different solution for smaller subsidiary / spinoff organisations. Finally, the CoSocius strategy will have been issued by the time of the next Committee, allowing the "opportunity analysis" phase of the process to be completed. This will help to identify:
  - i. whether the CoSocius strategy indicates that the type of solution required to meet the Councils' requirements will also support CoSocius requirements in terms of transactional service delivery, delivery of a marketable application platform, and their own requirements as a standalone business; and

- ii. the extent of any investment “ask” which would be required from Shareholders to support CoSocius’ strategy to deliver the requirements of their existing customers and potential future customers.

6.11 Initial work is also underway in parallel to gather requirements in relation to the Tranche 2 service review, **Cash Receipting / Income Management**.

## **Health and Social Care**

6.12 Despite both Authorities using the same core application to deliver social care across Adults and Children’s Services (“Liquid Logic”), the system has to date been procured differently, deployed and hosted differently, and is supported differently, across the two Councils, and even within each Council for the Adults and Children’s user base in each organisation.

6.13 This is therefore a complex review with many interested stakeholders. A detailed engagement plan has been developed. Initial meetings have been held with key stakeholders in relation to Adults social care delivery in both organisations. Similar discussions with Children’s stakeholders in each organisation are due in late September.

6.14 The two organisations do not have a tradition of working collaboratively in these areas of service delivery. However, discussions to date have demonstrated an openness and willingness to explore collaborative working, initially on procurement approach, underpinning technical infrastructure and/or support arrangements, and in the longer term on common or shared delivery processes which make best use of a common and shared technology solution.

6.15 There are new initiatives and supporting processes where both authorities could align systems and support processes. The Cheshire Shared Record is one such area, with both Councils working with the Countess of Chester to deliver a mechanism for data sharing across health and social care professionals, and where potentially there could be shared system administration and account management responsibilities.

6.16 Although the Care Account is not required by the Care Act 2016 implementation plan, both authorities are still looking at opportunities under the digital agenda to engage with clients and realise efficiencies via online access to care records and information about local care providers.

6.17 At the time of report, both the Councils and CoSocius are preparing their initial “baselining and future vision” strategy statements.

6.18 There are also strong overlaps with the scheduled Tranche 2 review on **Children & Young Persons**, which focusses primarily on the existing “Tribal” suite of application modules, covering areas such as schools admissions and Special Education Needs. Both Councils are reviewing requirements and seeking to make decisions about the use of both Tribal and Liquid Logic to deliver the full range of Children-related services. As such, requirements gathering has begun already in respect of this review and a decision will be progressed ahead of the previously agreed schedule. It is therefore proposed to merge the scope of the

**Health and Social Care** review with that of the **Children & Young Persons** tranche 2 review. This will mean that the decision relating specifically to Social Care will be delayed beyond the original deadline of December 2015 and will take place during the Tranche 2 review period.

## **End User Computing**

- 6.19 Both Councils have been actively pursuing a strategy of “Microsoft First”, with the intention of ensuring best value is delivered by existing contracts, and by maximising the value of those contracts by migrating wherever possible to Microsoft products in order to reduce the Total Cost of Ownership in this area versus equivalent solutions delivered by other suppliers.
- 6.20 Historic decisions taken by each Council has led to a differing approach to the deployment of end user hardware – eg desktop and laptop computers, tablet devices, etc. Microsoft Windows 7 has been deployed across the entire computer estate of both councils, providing a computing environment compliant with the Government Code of Connection standards mandated on the Councils by central government.
- 6.21 Cheshire East made a significant up-front investment in the “Next Generation Desktop” programme, involving delivery of access to business applications for end users using a product called Citrix, which essentially reduces the end user’s device to a “dumb terminal”, with all significant processing taking place on a centralised system. This has allowed ageing desktop computers to remain in use at a relatively low ongoing cost. Exceptions are made where a user has a clear business case to receive a more flexible device which supports specific mobile working requirements.
- 6.22 Cheshire West and Chester chose to adopt a different approach to Windows 7 rollout. The upfront Cheshire West and Chester investment in migration to Windows 7 was significantly lower than Cheshire East, but ongoing investment in end user devices is relatively expensive in comparison. A broader range of end user devices, including laptops and tablets, are available to users in accordance with their working patterns. Specific software is in use which allows some ageing applications to function on devices with a modern operating system. This has the benefit of supporting flexible and mobile working strategies with fewer restrictions than the Cheshire East model.
- 6.23 Both Councils have strategies for increasing the provision for flexible and mobile working, and increased collaboration across the Cheshire family is driving Council officers to demand ICT support working from an increasing variety of locations, some of which are owned or managed by partners.
- 6.24 With regard to asset management and the provision of end user computing devices, both Councils are currently managing their own procurement, ordering process and disposals. An opportunity exists for an external provider to provision this service to both councils, and market testing will focus on this aspect. CoSocius have previously indicated that they would be keen to offer this end-to-end service, and indeed already provide some components of the service. Also, consideration is currently being given by the Councils to a leasing model,

whereby a provider owns and manages the entire device estate, transferring the impact of asset depreciation to the provider, and simplifying the process of asset management from acquisition to disposal.

- 6.25 Both Councils are looking to move away from existing, costly, fixed telephony, to a greater use of telephony delivered through the user's computer and/or increased use of mobile phone solutions. Such moves would seek to maximise use of the Councils' existing licencing arrangements.
- 6.26 The Councils have issued their initial "baselining and future vision" strategy statement. CoSocius have, in parallel to this service review, commissioned an independent infrastructure review, examining aspects such as the Council-owned data centre and the network which provides connectivity to Council buildings. At the time of reporting the CoSocius strategy document supporting this service review is outstanding and subject to completion of the infrastructure review.

### **Geographic Information Systems (GIS)**

- 6.27 GIS is a system which exists in its own right as a method of managing a range of geographic data sets, and which also integrates to a number of line of business systems which rely on that geographic data. Both Councils use an existing system which is ageing and which requires replacement. A range of skills exist in CoSocius and in the Councils to utilise this data to support service delivery.
- 6.28 There are clear opportunities for both authorities to share a solution, supplier and an appropriate support wrap. Both the functional and non-functional requirements have been jointly developed and agreed. The governance structure in both Cheshire East and Cheshire West and Chester has been clarified and there is clear business support in progressing with a joint solution.
- 6.29 The Councils' "baseline and future vision" strategy document has been issued in draft and awaits signoff from key business stakeholders. This document is based on a significant body of existing joint work to understand requirements for both authorities.
- 6.30 Previous work has identified a number of potential alternative products which will be analysed during the soft market testing phase of this review.
- 6.31 The CoSocius baseline and future vision document has been shared previous as an early draft, focussing on a solution which makes use of open-source products as a means of providing similar functionality to the current solution but in a way which is potentially more scalable and more attractive to other organisations. A more formal submission remains outstanding at the time of reporting.
- 6.32 In the meantime, the Councils have approved a proposal by CoSocius to invest a small amount of capital in the development of a "proof of concept" based on this open source solution, which will resolve some immediate tactical issues with the existing system, as well as providing valuable intelligence to inform the CoSocius proposal.

### **Business Intelligence and Reporting**

- 6.33 This Service Review is focusing on the key strategic questions to be addressed by Business Intelligence (“BI”), and on a migration plan to an incumbent CoSocius-hosted corporate BI tool – Microsoft Business Intelligence (MSBI), to help address these. The costs and benefits of migrating existing 'legacy' reports into MSBI will also be considered. The roles required to support a successful corporate BI tool, including any opportunities for synergies across organisations, will also be referenced.
- 6.34 Cheshire East subject matter experts have articulated their Strategic Intelligence vision and how MSBI supports this – potentially alongside other tools and solutions. Outputs from the Cheshire West and Chester Insight and Intelligence programme are providing an equivalent viewpoint. Based on this work, the Councils' “baseline and future vision” deliverable is being populated collaboratively at the time of reporting.
- 6.35 Workshops are being scheduled across Cheshire East and Cheshire West and Chester to further identify and refine our understanding of the strategic questions to be addressed by BI, to detail any barriers to obtaining the data required to answer these questions, and discuss the opportunities for addressing these with a corporate BI solution. Workshops are taking place during the remainder of September and October. The agenda across the Cheshire East and Cheshire West and Chester will be consistent to facilitate comparable outcomes.
- 6.36 The CoSocius “baseline and future vision” deliverable is due to be issued at the time of reporting. Given the working assumption that an MSBI solution is likely to be appropriate, the focus of the CoSocius proposal will be on the cost of migration of legacy reporting solutions and the ongoing cost of operation of their existing MSBI solution.
- 6.37 Soft market testing will focus on an evaluation of alternative MSBI suppliers to understand whether the costs of migration to the CoSocius solution represent best value for the Councils or whether working with alternative solution providers may deliver a more cost effective approach.

### **Schools Information Management System / Services to Schools**

- 6.38 The focus of this service review to date has primarily been on the range of services offered by CoSocius to their schools' customers. Schools have some discretion over the package of services purchased from CoSocius and make these decisions on an academic year basis.
- 6.39 The Councils' requirements are limited to ensuring that schools are able to deliver the information necessary to allow the Councils to comply with statutory reporting requirements set by Central Government. Currently, Cheshire East utilise in a mechanism which allows schools data held locally rather than centrally to be gathered and collated in support of Council reporting. Cheshire West and Chester have achieved a budget saving by moving away from this mechanism, but with a consequential impact on the timeliness of information available to support corporate reporting.

- 6.40 The Council requirements are therefore for a solution which delivers a minimum set of information which meets statutory / regulatory requirements in a timely and cost-effective manner. The Councils' "Cloud First" strategy would support a solution which moves away from locally-held data to a mechanism which holds data centrally and allow for efficient and timely reporting.
- 6.41 The CoSocius "baseline and future deliverable" strategy, shared as an early draft but not yet formally issued at the time of reporting, sets out a broad view of the service offered to the schools community. The delivery of a reporting capability to the Council forms a small element of this overall offer. The focus of this service review is therefore expected to be the CoSocius assessment of the current range of services available to schools, and any investment proposal for Shareholder consideration to develop this product set.

### **Resource Planning - Homecare**

- 6.42 The existing homecare resource planning system is hosted by CoSocius and operated on an entirely shared basis by both Councils, being a legacy arrangement which dates back to prior to the formation of the Councils. The system is used to allow staff who deliver home care services to vulnerable service users to manage their schedule while on the move and to check in and out of each service user's house as they work through their appointments.
- 6.43 The mobile handsets which the system relies upon are several years old and becoming unreliable, leading to safeguarding concerns where appointments are being missed. The system itself would require an upgrade to allow it to be used with more modern mobile devices. Both Councils have expressed a desire to move urgently to a disaggregated cloud-hosted version of the product, which would resolve both hardware and data protection issues.
- 6.44 Cheshire East has led on a procurement process using a procurement framework which would deliver a cloud version of the current system and the associated mobile devices. Requirements have been defined by Cheshire East and confirmed as appropriate by Cheshire West and Chester. Cheshire East has been asked to ensure Cheshire West and Chester has access to the contract being established, to ensure a common system is selected and to minimise procurement effort across the two authorities. This shared information will form the basis of the baseline and future vision statement for the Councils, which is due to be issued in mid-September.
- 6.45 There are opportunities for a shared approach to implementation and provision of a support service "wrap" to the two authorities. CoSocius have not at the time of reporting shared their "baseline and future vision" statement for this product but have issued through normal business a proposal for implementation support to the Cheshire East project.

### **Customer Services and Website**

- 6.46 There is a need to ensure all of the systems being used to deliver customer services are up to date and supported, and are the best choice of solution for delivering the "digital by design" agenda that will enhance customer service



whilst allowing savings to be made through increased efficiency in how these services are delivered, eg a greater focus on self-service and online transactions rather than telephony or face-to-face interactions with the Councils.

- 6.47 Currently both Councils have different systems for most aspects of Customer Services aside from the Avaya telephony system (which supports both Councils' customer contact facilities) and SharePoint (which supports web-based information sharing).
- 6.48 Cheshire East has invested significantly in their existing Customer Relationship Management (CRM) system, Microsoft Dynamics, and has adopted a Digital strategy which is underpinned by the use of Dynamics. There is therefore no appetite to consider alternative solutions.
- 6.49 Cheshire West and Chester have set up the joint venture Qwest to deliver customer services on behalf of the Council. Qwest has inherited Cheshire West and Chester's CRM system Lagan, but is actively reviewing alternative solutions with a view to procuring a strategic solution in the near future. Microsoft Dynamics is under consideration, and the opportunity to work collaboratively with Cheshire East and CoSocius on this product may introduce benefits in terms of reduced cost of operation per customer, but this will be considered alongside the costs and benefits of other solutions and providers. Lagan is a well-developed system with existing investment in integration with Cheshire West and Chester's customer-facing website, and any replacement would need to ensure such integration between customers and back office systems is maintained or enhanced.
- 6.50 There is no current sharing of CRM between Cheshire East and Cheshire West and Chester, or sharing of procurement, support and delivery arrangements, beyond that fact that CoSocius host, develop and support both existing systems. CoSocius have previously shared an early draft of their "baselining and future vision" strategy and have been working closely with Cheshire East on the development of their digital strategy and associated procurement exercise.
- 6.51 Both Councils use Avaya telephony and call centre management systems. The functionality delivered by such a system is a requirement that must be maintained, however, should an alternative solution be found which will deliver the same functionality, a move from Avaya would be an acceptable alternative. Market testing for this service review will focus on this aspect of the scope.
- 6.52 In respect of website delivery, the existing Content Management System platform ("Immediacy") licenced by Cheshire West and Chester is now unsupported. Qwest are required to replace Immediacy with a modern CMS platform by April 2016. The Cheshire East web platform is externally hosted by Zengenti, with no immediate requirement to move from this solution. As with CRM options, Qwest may consider adoption of the Zengenti solution if the balance of costs and benefits supports this choice.
- 6.53 Overall, opportunities for overt collaboration were initially believed to be limited due to the significantly different delivery models across the two Councils. However, Qwest have demonstrated themselves to be very open to the benefits

of collaboration with Cheshire East and CoSocius where a business case exists, and work continues to determine the most appropriate product set and the extent to which these can be shared.

## **Planning and Building Control**

- 6.54 The scope of this service review as defined introduces a relatively complex set of stakeholders. Within Cheshire West and Chester, both Planning and Building Control are delivered in-house, but with separate system support arrangements in place or being developed for each of those functions. Within Cheshire East, a subsidiary has been established for delivery of building control and planning support, with planning remaining an in-house Council function. Each authority uses a different application to deliver these functions. The opportunity for Cheshire East to mandate the user of a particular solution by its subsidiary is limited; however stakeholders within Cheshire West and Chester are positive about the opportunity to develop a shared application platform as a means to facilitate further collaboration in future. Cheshire East stakeholders are still to engage in this review.
- 6.55 Further complexity is introduced by the fact that within Cheshire West and Chester, the system which supports Planning and Building Control – IDOX – also supports Environment Health (a Tranche 2 review), Trading Standards, Licencing, Anti-Social Behaviour and Property (none of which are within the existing scope of the programme). A decision taken about the future of IDOX would have consequences for a much wider user base than those within Planning and Building Control. A similar position exists within Cheshire East, where the Swift application has a similar cross-Service deployment.
- 6.56 The intention is therefore to undertake a review of baseline activity and future strategy across all impacted service areas with a common interest in the IDOX and Swift solutions. This will mean that the decision relating specifically to Planning & Building Control will be delayed beyond the original deadline of December 2015 and will take place during the Tranche 2 review period.

## **7.0 Next Steps**

- 7.1 The Committee has its next scheduled meeting on 27 November 2015. By this stage, it is expected that firmer conclusions on the preferred solutions for a number of service review areas will be available to share with Members. Service reviews expected to be well progressed by this date are:
- End User Computing
  - Geographic Information Systems
  - Business Intelligence and Reporting
  - Customer Service and Website
  - Schools Information Systems
- 7.2 It is also expected that Members will be given a briefing on progress and direction of travel with other key areas of review, in advance of the formal completion of each review area.

## **8.0 Wards affected**

8.1 None.

## **9.0 Policy implications**

9.1 None.

## **10.0 Financial Implications**

10.1 The contract with CoSocius represents a significant spend for each Council and the reviews currently in progress will ensure that the Councils receive value for money for their taxpayers. The service reviews underway will ensure that this situation is continually monitored in a fast changing ICT environment.

## **11.0 Legal Implications**

11.1 The previous report to the Committee on the subject of CoSocius included a number of proposals which were to be incorporated into Deeds of Variation to the contracts between the Councils and CoSocius (affecting the Shareholder Agreement and the Operating Agreements), with the intention of providing all parties with clarity and certainty. The proposals included a number of specific outcomes in contractual terms which could arise from the outcomes of the different elements of the service review programme.

11.2 At the time of reporting, the changes to the contracts have not been finalised and as such the Deed of Variation has not yet taken effect. All stakeholders are continuing to work collaboratively on those outstanding issues which require resolution before the contract amendments can be finalised.

## **12.0 Risk management**

12.1 Programme risks are being identified and reported as necessary to the Transition Board through normal programme management mechanisms. The Board will escalate any significant risks to the Committee as appropriate during the course of the programme.

## **13.0 Access to Information**

13.1 The background papers relating to this report can be inspected by contacting the report writers:

: Peter Bates / Mark Wynn

: Cheshire East – Chief Operating Officer / Cheshire West and Chester – Head of Finance

Tel No: 01270 686013 / 01244 977830

Email: [peterbates@cheshireeast.gov.uk](mailto:peterbates@cheshireeast.gov.uk) / [markwynn@cheshirewestandchester.gov.uk](mailto:markwynn@cheshirewestandchester.gov.uk)

Background Documents:

*Documents are available for inspection at:*

*Cheshire East Democratic Services*

*Westfields*

*Middlewich Road*

*Sandbach*

*CW11 1HZ*

*or:*

*Cheshire West & Chester Democratic Services*

*HQ Building,*

*Nicholas Street,*

*Chester,*

*CH1 2NP*

## Appendix A – Scope of Service Reviews

Service for Review	Description
Enterprise Business Systems	<p>The Enterprise Resource Planning (ERP) system offers an integrated suite of applications covering core business functions including transactional shared services, corporate finance, strategic and operational human resources. The application is comprised of modules some of which are Payroll, HR, Procurement, vendor management and invoicing, customer management and invoicing and General Ledger. The applications support 8000 users, processing 69 payrolls and salary payments in excess of £20,000,000 per payroll period across Cheshire East/Cheshire West and Chester. Integration extends into other key line of business systems such as Social Care (Adults and Children) and Cash Receipting and Income Management. This system is used jointly by Cheshire East/Cheshire West and Chester, approximately 300 maintained schools, approximately 50 academies, town councils, Cheshire Pensions and other SLEs/ASDVs.</p> <p>The review will assess the viability of this system to support the current and future business requirements and operating models for the existing user base. This will require an analysis of the related business processes through the above organisations and CoSocius.</p>
Social Care (Adults and Children)	<p>The review will assess the viability of the underlying systems to support the delivery of adults and children social care. This will include reporting mechanisms, delivery of finance care packages, and delivery of the early support models through multidisciplinary teams. Key systems licences are approaching renewal in this area.</p> <p>Key influencing factors in the review will include the regional Pioneer bid, Complex Dependency bid, and care act changes, which are driving integration across health professionals and transparency for the customer.</p> <p>This is a key area for review as it is seen as a prime commercial opportunity for CoSocius as all councils look at the way they deliver social care.</p>
End User Computing (Desktop, mobile, telephony and network, etc)	<p>The review will assess the technology platforms required to support end user computing across client organisations, identifying opportunities for harmonisation across CoSocius customer base, simplification of CoSocius product offerings, and how this can support future flexible and mobile working requirements driven by organisational change and respective accommodation strategies.</p>

Service for Review	Description
Geographic Information System	<p>The current Geographic Information System (GIS) provides an integrated mapping service to multiple high profile services within East and West, including Planning, Highways, Elections, and other public facing Services. GIS also manages over 900 spatial datasets made available to Cheshire West, Cheshire East, the Cheshire Public, and any wider audience via both internet sites, with approximately 100,000 visits to GIS internet sites per month. The current solution is old and needs to be replaced. Without having a true marketable service, there are regular approaches from external organisations to provide GIS Services, either as Service Offerings or via an Invitation to Tender. There is also opportunity to extend GIS to other East and West teams such as Schools, Transport. Work is already underway, to gather requirements for a robust, future, marketable GIS Service. There is a recognised gap in the external market, particularly locally. It is also an excellent means to engage with external clients around potential data sharing and joined up working. Review would recognise the enormous potential for GIS as a marketable, commercially profitable Service within an increasingly demanding customer base, as well as realise obvious business efficiencies through greater internal use of GIS and greater understanding of Service needs.</p>
Business Intelligence and Reporting	<p>This platform is shared across CoSocius and its clients, and is used for the delivery of Management Reporting and Business Intelligence. The current capability is delivered through a disparate set of solutions (including Oracle, SAP Business Objects and Microsoft Sharepoint) that struggle to present a holistic picture. The review is required to inform strategic direction and bring BI capabilities together. Improved BI and Reporting will strongly support process improvement for all three parties.</p>
Schools Information System (SIMS)	<p>The vast majority of LA maintained schools across East and West use Capita SIMS. The LA's pay an annual entitlement license fee to Capita, which is based on a per pupil cost for primary/special schools and secondary schools. This entitlement fee covers SIMS core and curriculum modules. Some schools will also pay a license fee direct to Capita for extended modules. Currently each school locally hosts their SIMS application; however CoSocius now have a private cloud solution available for all primary schools to purchase. When a school converts to an Academy, they have to purchase their original license from Capita (Schools Direct Licensing) as well as pay their own annual entitlement fee for support and maintenance at a non-reduced rate. The range of support services that CoSocius can offer schools is vast. The relationship between Local Authorities and education establishments are in a state of constant flux dictated by DfE requirements. CoSocius need to be positioned so that they can respond effectively to schools ever changing ICT related</p>

Service for Review	Description
	requirements.
Resource Planning (Homecare)	Homecare roster is a legacy solution in need of renewal which integrates with mobile working handsets. There are currently issues associated with the age of the mobile technology and its level of email integration for mobile working. This review presents an opportunity for the business clients to assess their needs and what mobile working requirements mean to future implementations.
Customer Service and Website Content	<p>The two clients have established differing strategies for Customer Services and this exercise will present an opportunity to understand the implications of this, and the opportunities for CoSocius in light of the two strategies. Cheshire West and Chester has recently entered into a contractual arrangement with a JV partner for the delivery of Customer Services and Facilities Management and both Councils are leading separate agendas to look at all customer facing contact and its integration with the digital platform.</p> <p>This approach has been strongly influenced by the need for the digital agendas to drive a very clear customer identify for each borough and will assess the implications of the diverging business strategies on the technology platforms and subsequent CoSocius product offerings; not limited to but including customer authentication/registration, customer portal, master data management, website and technology/data integration, etc.</p>
Planning and Building Control	<p>East and West Planning and Building Control Systems deal with over 500 Planning Applications each month, and over 200 Enforcement Cases. There are approximately 600,000 visitors to the Planning websites each month.</p> <p>East and West are currently utilising different solutions for this area, both of which are currently up for review from a licensing perspective. This area comes under significant scrutiny from the public. The review will provide an opportunity to evaluate the two business strategies, re-evaluate the solutions being adopted across East and West, and assess options in light of the digital agenda being adopted by both clients.</p>
Revenues and Benefits	The Revenues and Benefits System Landscape and Support Model is particularly complex, mainly due to the rapid need to implement legislative change within the Business Area. There are over 25 supported systems that deliver the service to both East and West. The systems hold, amongst other information, over 315,000 Council Tax Accounts that are accessed by over 500 users. Through Council Tax and Business Rates, a revenue income is generated in excess of £300,000,000 per

Service for Review	Description
	<p>authority. The review will provide an opportunity to assess the extensive systems estate and the viability of these systems to support the current and future business requirement / operating models for the existing user base, which will require an analysis of the related business processes through the above organisations and CoSocius.</p> <p>There is clear scope for efficiency across the two authorities and for the development of a marketable solution for CoSocius to take to the wider market.</p>
Cash Receipting and Income Management	<p>The Cash Receipting and Income Management system is the single corporate means of making internet, intranet (via Contact Centre), telephone, face to face and paypoint payments for the vast majority of Council Services. The System deals with almost 1,500,000 transactions every year. It is predominantly the same system used by both East and West, with similar supporting business processes in East and West.</p> <p>The technical solution for this area is the same for both Councils but separate environments are maintained. This review will assess the benefits of bringing this system together, ensuring consistency across business processes and standardising systems architecture, whilst considering both councils digital agenda.</p>
Highways	<p>The Confirm application is used by both Councils but maintained separately. It is due for contract renewal and this review will provide an opportunity to ensure a modern, fit for purpose system and business process is assessed for both Councils and its partners.</p> <p>The review will provide an opportunity to evaluate the two business strategies, re-evaluate the solutions being adopted across East and West and assess options in light of the digital agenda being adopted by both clients.</p>
Children and Young Persons	<p>These business areas are currently serviced by a collection of legacy applications, standard to both Councils but maintained separately. The Tribal Synergy CYPD Suite is a Children's Education Case Management System used in West and East. It is a multi-modular system for specific service areas such as Admissions and Special Educational Needs (SEN). This review will provide the opportunity to modernise the technical solution to support an evolving business model.</p> <p>The review will provide an opportunity to evaluate the two business strategies, re-evaluate the solutions supporting East and West and assess options in light of the digital agenda. Joint working is already underway to identify appropriate procurement routes and potential options.</p>
Document Management	There are currently a number of different, document management solutions in place across both



Service for Review	Description
	<p>Councils, in some cases directly linked to specific applications, e.g. Civica for Revs and Bens (Cheshire West and Chester). The enterprise SharePoint platform currently holds some 1.36 million documents, enabling collaboration, workflow, security, records management and version control seamlessly with Microsoft Office and 3rd party applications, including mobile. This review will provide an opportunity to review the needs of the Councils and CoSocius to recommend a standard document management solution going forwards, not only realising efficiencies through reducing spend on existing systems and systems support, but also by having a shared, consistent approach to document management.</p>
Elections	<p>Both Councils use different systems but the business process will be in line with the necessary governance required to support the political process across all local authorities. This review will provide an opportunity to evaluate the two business strategies, re-evaluate the solutions being adopted across East and West and assess options in light of the digital agenda being adopted by both clients.</p>
Environmental Health	<p>This will include Trading Standards, Pest Control, Licensing, etc.  East and West are currently utilising different solutions for this area, both of which are currently up for review from a licensing perspective. This area comes under significant scrutiny from the public. The review will provide an opportunity to evaluate the two business strategies, re-evaluate the solutions being adopted across East and West and assess options in light of the digital agenda being adopted by both clients.</p>
Transport	<p>East and West are currently utilising different solutions for this area, both of which are currently up for review from a licensing perspective.  The review will provide an opportunity to evaluate the two business strategies, re-evaluate the solutions being adopted across East and West and assess options in light of the digital agenda being adopted by both clients.</p>

## Appendix B – Service Review Methodology



