Report to:	**Overview and Scrutiny Panel**
Date:	**28th June 2018**
Title:	**Civica IT Lessons Learnt**
Portfolio Area:	**Support Services – Cllr N. Hopwood**

Wards Affected: **All**

Relevant Scrutiny Committee: Overview and Scrutiny

Urgent Decision: **N**   Approval and   **Y**
                                 clearance obtained:

Date next steps can be taken:
(e.g. referral on of recommendation or
implementation of substantive decision)

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Recommendations:

That the Panel endorses the conclusions of the lessons learnt exercise set out in section 3 of the report and the proposed actions in section 4.

1. **Executive summary**
   1.1. Following the closure of the T18 programme, members had requested a specific paper highlighting the lessons learnt from the procurement and implementation of the Civica IT systems.

   1.2. The key purpose (and good practice) for carrying out a lessons learnt exercise on key projects, is to ensure continuous learning and that any future projects are managed better and resources used more effectively in the future.

   1.3. This report uses a project lessons learnt methodology to highlight the learning points for both the council and the supplier. The lessons learnt covers 4 key areas.
      • Programme Execution

- Technical Delivery
- Product
- Customer Service and Relationship

1.4. 17 stakeholders were independently interviewed by our Project Manager. The breakdown of these is as follows:
- 4 Technical and Tech Leadership
- 3 Business Development Team (process build)
- 2 Councillors
- 1 Senior Leader
- 2 Project Managers
- 5 Business Team and Business Leadership

1.5. Civica have had the opportunity to view the scoring and anonymised comments so that they too can use the information to improve their delivery and products.

2. Background

2.1. The supplier of the IT solution is Civica. A contract to supply our key IT services to drive transformation was procured during 2013 and signed in April 2014. The contract duration is 5 years, which the option to extend for 1 + 1 years. At the time of the procurement Civica were the only supplier that met the council's requirements.

2.2. The ICT element of T18 programme is considerable and initially comprised of 10 distinct elements. Each project in its own right is a significant piece of work.

2.3. Workstreams with Civica as part of the key components.
- T1-Core Infrastructure - the provision of infrastructure and configuration to support the Civica application suite.
- T2-Mobile - to deliver a solution for mobile and agile locality officers.
- T3-GIS (Geographical Information Systems) – replace the existing GIS and enable improved self-serve using spatial data (maps).
- T4-Web/Portal – to develop a solution that promotes 'digital by choice', that enables 2 way communication with our residents. It will enable citizens to 'apply for it', 'pay for it', 'report it', 'book it' and view and track any of those requests.
- T6-Back office systems migration – migrate the Waste, Planning, Land Charges, Environmental Health, Licensing, Housing back office systems to Civica APP.
- T7-Back office system integration – to enable integration of Civica W2 with remaining back office systems e.g. Revenues and Benefits.
- T10-Document / Image migration – to move historic documents, files and images associated with a customer or property record to the new Civica W2 system.

2.4. Workstreams that did not use Civica systems.
- T5-Telephony – a corporate unified communications solution to aid agile working. Provide an integrated new telephony system for the Customer First contact centre.

- **T8-Infrastructure** – replacement of the corporate IT infrastructure to support agile working and provide a cost effective scalable platform.
- **T9-Members ICT** – equip members with technology that will enable them to work and communicate effectively.

2.5. The issues with the delivery of the IT workstreams have been reported back to this panel and council on a number of occasions over the course of 2015/16/17. Regular contact was established between Civica's Managing Director of Civica Digital Solutions with the Head of Paid Service and Group Manager Support Services. Civica also presented to members of South Hams and West Devon councils.

2.6. As a result of the number of the issues experienced, the council negotiated a number of measures that resulted in additional Civica technical support and resources, a credit against future work and an ongoing reduction in support and maintenance charges based on the current contract.

3. **Outcomes/outputs**

3.1. The following questions were put to all respondents

- **Scope/Impact:** To what extent do you believe Civica/SHWD had a shared mutual understanding of the deliverables within this area and vision on value to business?
- **Project Controls:** Were Civica/SHWD working in a joined up fashion, understanding of responsibilities, deadlines, dependencies, reporting etc.
- **TimeLine:** How do you rate the timing from project/deliverable outset to roll into live?
- **Quality:** How do you rate working with the Civica Product suite/software, platform, configuration, flexibility and reliability?
- **Communications:** How effective do you believe both organisations were from a joint working and communications perspective?
- **Abnormal Events:** Were there any surprising/abnormal events that occurred during delivery? How do you believe it was solved/handled? (SHWD & Civica scoring)
- **Testing to Transfer to Live:** How did the testing stage go? Plan, Structure, Issue Management, Quality of product. How did roll into Live go? Plan, Structure, Issue Management, Quality of Tech Support/Focus
- **Effect:** Assuming deliverable is in Live, what impact on increasing efficiency for the business? Positive/Negative.
- **Delivery:** To what extent do you believe the initial scope of this delivery has been met?
- **Future:** As you look 5 years into the future, how do you rate Civica's products and organisation to support SHWD's challenges.
- **Lessons Learnt / Actions Required / Additional Comments.** What do we want to achieve and when – what does success look like?

3.2. Respondents were asked to score the following areas against the above criteria;
- Integration of existing systems
- Testing
- Implementation (project management)

- Website / Customer Portal
- Document Management (and scanning) (W2)
- Workflow (w2)
- Mobile (W2)
- CTAX/NNDR Web Portal, Integration
- Land Charges
- Data Management)
- System Support/Bug Fixes

3.3. A summary of the scores is shown in Appendix A.

3.4. A summary of the key learning points for each of the four areas is shown below;

3.5. **Programme Execution**
- SHWD staff lacked knowledge of contract due those involved in the procurement leaving in the early stages. This included original scope and deliverables which impacted relationship with Civica from outset.
- Imposed project plans from Civica should have been halted, reviewed and jointly reset at outset. Civica's lack of flexibility on resources was the cause.
- Poor due diligence and early understanding by Civica of SHWD setup.
- SHWD reducing workforce prior to IT benefit realization in business was a key impact (a) no additional resources to support the change (b) disruption and reduction in working pace on a smaller team.
- Civica early stages lack of dedicated, experienced, knowledgeable staff resources and also a 'rigid' organisational approach resulted in Civica's inability to be flexible with resources.
- Delivery to time and quality not linked to contract terms in enough detail.
- Poor joint tracking of 'within contract' technical resource burn during first year (2014/15) left the programme in poor state for latter stages of rollout that required Civica technical resource.
- PM attrition rate.
- Joint effectiveness good when there is a big senior level issue. Both teams pull together well.

3.6. **Technical Delivery**
- A lack of knowledge and leadership from Civica on the configuration of their products.
- Civica promised whole product, from ground zero in very short timeframe. This proved unrealistic. Repeated promises that didn't deliver. This led to a reduction in trust and quality of relationship at all levels. Civica demonstrations were always mock-ups. (Other suppliers show real product with our data/content and integration to other SHWD systems. Civica need to match that.)
- Civica did not work well internally. Onus on SHWD to manage what appeared to be two / three separate organisations.
- Civica quality of product released into SHWD test varied from average / poor to unworkable.
- Availability of key technical staff limited resulting in simple issues taking protracted timescales to deliver.

3.7. Customer Service (Including Relationship)

- More openness, honesty, transparency needed from outset. Disingenuous and defensive on fault finding and fixing. No ownership/apology.
- Civica's products, org structure and support mechanisms are still geared to providing back office council systems not front office end-customer facing services.
- Civica Support Desk improving through better processes. Staff still need more training (SHWD staff often know more than support desk staff).
- Civica resources in the last year (Operations, technical, project) have been better quality.

3.8. Product

- Civica products are in some cases inferior to previous products on usability and flexibility. However Civica stated that improvement and benefits 'would be a different product with wins due to end-to-end nature'. This 'end-to-end' solution is at best limited, as are the realised benefits.
- SHWD constantly being asked to test. Too much effort and results in distraction from Business as usual tasks.
- Civica not showing any innovation or integration to deliver end-to-end or efforts to move with the times. Investment in 'IQ' (new product) being one exception.
- Reporting and MI much better than we had before.

4. Proposed Way Forward

4.1. Section 3 of this reports sets out a number to the issues encountered. Many of the issues may have been avoided had there been more due diligence and understanding from both the Council and its supplier. It should be noted that in reality this was also a 'bleeding edge' project for both parties i.e. the council had not embarked on a transformation programme on this scale and Civica had not applied and integrated their technology solutions across a whole range of services the outset of the programme.

4.2. It is proposed that the lessons learnt are now collated into a checklist that will applied any future procurement IT and non-IT. A review lessons learnt against all of the existing risk registers for any current procurement / project will be undertaken within the next 3 months.

4.3. Our existing project management process has already been amended so that a lessons learnt exercise is carried out at the end of each phase of a project/procurement. The waste procurement is an example of this happening.

5. **Implications**

Implications	Relevant to proposals Y/N	Details and proposed measures to address
Legal/Governance	N	
Financial	Y	The financial position has been reported in the T18 closedown report.
Risk	Y	As stated in Section 4 a review of the lesson learnt will be undertaken on any current major procurement / project and adopted as part of the project and procurement processes.
Comprehensive Impact Assessment Implications		
Equality and Diversity	N	
Safeguarding	N	
Community Safety, Crime and Disorder	N	
Health, Safety and Wellbeing	N	
Other implications	N	

Supporting Information

Appendices:

Appendix A – scores from lessons learnt.

Background Papers:
None