

Record of individual Cabinet member decision

Local Government Act 2000 and the Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012

Decision made by	Councillor Debby Hallett (Cabinet Member for IT) in consultation with Councillor Bethia Thomas (Cabinet Member for Customer Services) and s151 Officer.
Key decision?	Yes - Contract value is above £75,000 threshold
Date of decision (same as date form signed)	8 July 2022
Name and job title of officer requesting the decision	Simon Turner, IT Manager
Officer contact details	Tel: 07917 088359 Email: simon.turner@southandvale.gov.uk
Decision	<p>To approve additional funding of £42,709 for the purchase of a Customer Relationship Management (CRM) software package, under 6.4 of the council's Scheme of Delegation to Officers.</p> <p>The authority to approve the purchase of a CRM solution is delegated to the Head of Corporate Services in Consultation with relevant Cabinet Members (Cabinet December 2021).</p> <p>To approve the purchase of a customer relationship management (CRM) solution at cost of £37080 per council in year 1 and £42780 per council in year 2. A one-off implementation cost of £39,050 per council.</p> <p>The contract is a joint software licence agreement between Vale of White Horse District Council, South Oxfordshire District Council and GOSS Interactive.</p> <p>The council has run a procurement evaluation using the GCloud 12 framework (RM 1557.12) for cost comparison and suitability of solution and the outcome is to award to Goss Interactive under a call-off contract for 2 years (with the option to extend for 2 periods of 12 months). The award is made on the basis of the most advantageous to the councils.</p>
Reasons for decision	The Customer Strategy for the Councils has set out a new approach to delivery, modelled on customer centred service design and delivery rather than being product or service driven.

The Customer Relationship Management system is a critical part of the Councils' technology provision which will support the delivery of the Customer Strategy. Without it the Councils will be unable to join the dots between services around our residents and businesses. This will then identify how customer service provision can be streamlined to ensure delivery against the core principles of "once and done" for transactional activity and "right first time" where we have an ongoing relationship.

We are seeking to procure this through the Government's GCloud framework, and officers have completed an assessment of a number of proposals from companies originally shortlisted from the framework. The GCloud framework allows for a contract length of 2 years with the option to extend for 2 lots of 1 year if we wish to. Costs have therefore been included for 2 years. Any decision to extend the contract beyond 2 years would be the subject of a further report.

The original indicative budget agreed for the CRM system is for one off Capital funding of £72,400 and ongoing revenue funding of £40,000 p.a. (total for both councils). Subsequent discussions as part of the baseline assessment of services has revealed opportunities to bring forward some transition work by including some additional functions with the initial package. This is in keeping with the ambitions set out in both the IT and Customer Transition strategies to maximise integration between the CRM and back office systems. The table below summarises these and the respective costs.

The Whitespace and GIS connectors will enable us to fully automate garden waste processes, including links to Biffa. It also provides the opportunity to transition other waste processes where customer service is provided in house such as bulky waste. In the medium term it will provide the opportunity to consider other elements of the waste customer service that could be removed from the waste contract as part of the contract review currently being undertaken, potentially releasing savings on contract costs.

We have recently become aware that Oxfordshire County Council is no longer accepting reports of issues relating to district council responsibilities via it's Fix My Street system, this leaves a gap for our customer in how they can accurately raise problems in their area. The GIS Connector and 'report it' functions available with the CRM provides us with the opportunity to provide an alternative to Fix My Street.

The baseline work has also revealed that bookings for our community centres are not yet automated and can be. Current process involves a great deal of manual handling using spreadsheets to record bookings and each centre uses slightly different processes, bringing bookings into the CRM would provide a consistent customer experience. Re-engineering and automating this process will save on staff time and potentially increase income by taking payment at the point of booking not at the point of use. Including this with the CRM package avoids the cost of procuring an alternative booking system for community centre bookings.

The preferred supplier has included 'report it' and bookings functions

within the standard package one off cost, but this has an ongoing revenue cost which is not currently budgeted for – shown in the table below.

One off costs relating specifically to the initial implementation of the CRM are included as capital, as is the one-off training cost. The training cost is for the supplier to train staff in our IT development and customer service teams to be able to develop the CRM to add additional functionality without the need to revert to the supplier except in exceptional circumstances, thereby saving costs in the further roll out.

The CRM software is configured in a way that we can add to the functionality through purchasing additional connectors and if required, professional services, on a case by case basis as we transition individual services in line with the approved road map. As opportunities arise to increase the reach of the CRM we will consider the business case to do so on a service by service basis.

	One off capital	One off revenue	Year 1 revenue	Year 2 revenue
Basic package	30,350	0	48,524	53,820
ADFS connector	2,250	0	3,828	4740
Social media authenticator	2,250	0	0	0
Capita Payment Connector	0	0	2,859	3,540
Postcode Look Up	0	0	727	900
Training	9,500	0	0	0
Professional services	18,750	0	0	0
	63,100	0	55938	63,000
Additional connectors				
Bottom line connector	3,750	0	2,859	3,540
White space connector	7,500	0	5,767	7,140
Bookings & 'report it'	0	0	6,736	8,340
GIS connector	3,750	0	2,859	3,540
	15,000	0	£18,221	£22,560
Indicative budget (IT Strategy)	72,400	0	40,000	40,000
Actual costs	78,100	0	74,159	85,560
Additional costs	5,700	0	34,159	45,560
Additional costs per council	2,850	0	17,079	22,780


Alternative options rejected

1. Not to purchase a CRM system – this option is rejected because procurement of a suitable CRM system is fundamental to achieving the customer transformation as outlined in the previously approved strategy and road map and agreed by Cabinet in Nov 2021.
2. 2 further suppliers were assessed in detail as part of the final shortlisting process – they are rejected for cost reasons.

The Customer Services strategy approved by the councils clearly outlines the requirements for a CRM solution.

Climate and ecological implications	<p>The move to customer centred service provision through digital channels will support the councils' carbon reduction ambitions by reducing the reliance on paper and avoiding unnecessary journeys for specific service activities. It can also be used to engage with residents and businesses digitally to encourage positive climate change activities.</p> <p>Tangible gains in this area will include a reduction in traditional communication methods e.g. move to email and away from post (potential £48,000 per annum saving on garden waste alone), reducing the carbon footprint whilst also delivering savings.</p>																																																		
Legal implications	<p>The procurement of the CRM system has been undertaken in accordance with the councils Contract Procedure Rules.</p> <p>The contract award will be made using G-Cloud12 framework (RM1557.12) and a call off contract will be entered into with Goss Interactive. G-Cloud-12 is an approved and compliant framework for purchasing cloud services, including licences for Software as a Service (SaaS) applications such as CRM, with standard terms and conditions for local authorities.</p> <p>There are always risks when the council enters into a contract and it cannot mitigate against all of them, especially when the council enters into a framework agreement whereby the contract has little scope for amendment. The terms of the call off contract will be reviewed by Legal prior to final contract award.</p>																																																		
Financial implications	<p>Funding requested and potential savings are shown in the table below. In summary, the capital cost of the basic package is well within the indicative budget identified in the IT Strategy. Ongoing revenue costs are slightly higher than expected. However, the package offers the opportunity to include some additional functionality, and both the additional revenue costs of the basic package and the additions will be offset by efficiency savings identified.</p> <table border="1" data-bbox="424 1395 1378 1794"> <thead> <tr> <th>Budget</th> <th>One off capital</th> <th>One off revenue</th> <th>Year 1 revenue</th> <th>Year 2 revenue</th> </tr> </thead> <tbody> <tr> <td>Current Indicative budget (IT Strategy)</td> <td>72,400</td> <td>0</td> <td>40,000</td> <td>40,000</td> </tr> <tr> <td>Actual costs</td> <td>78,100</td> <td>0</td> <td>74,159</td> <td>85,560</td> </tr> <tr> <td>Additional funding requirement</td> <td>5,700</td> <td>0</td> <td>34,159</td> <td>45,560</td> </tr> <tr> <td>Additional requirement per council</td> <td>2,850</td> <td>0</td> <td>17,079</td> <td>22,780</td> </tr> <tr> <td colspan="5">Estimated savings</td> </tr> <tr> <td>Garden waste</td> <td></td> <td></td> <td>59,000</td> <td>59,000</td> </tr> <tr> <td>Bookings</td> <td></td> <td></td> <td>8,300</td> <td>8,300</td> </tr> <tr> <td>Staff reduction due to reduction in contact</td> <td></td> <td></td> <td>30,000</td> <td>30,000</td> </tr> <tr> <td>Total</td> <td></td> <td></td> <td>97,300</td> <td>97,300</td> </tr> </tbody> </table> <p>Potential savings of £48,000 have already been identified in the Customer Transition strategy from reduction in printing costs relating to current garden waste customers.</p> <p>A 10% increase in customers will generate a further £11,000 per annum in print and postal cost. The need for a booking system for community facilities will be fully recovered through service efficiencies and improving</p>	Budget	One off capital	One off revenue	Year 1 revenue	Year 2 revenue	Current Indicative budget (IT Strategy)	72,400	0	40,000	40,000	Actual costs	78,100	0	74,159	85,560	Additional funding requirement	5,700	0	34,159	45,560	Additional requirement per council	2,850	0	17,079	22,780	Estimated savings					Garden waste			59,000	59,000	Bookings			8,300	8,300	Staff reduction due to reduction in contact			30,000	30,000	Total			97,300	97,300
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	<p>take-up, addressing the £8,300 per annum cost there at the very least.</p> <p>More generally a reduction in duplicate customer contacts and increased self service will generate cost savings in front line services and a reduction in business support staff of just 1 FTE (estimate £30,000) across both councils will fully cover the increased revenue costs.</p> <p>In summary, the revised business case has identified cost efficiencies of £97,300 per annum against a cost of £85,560 per annum from year 2 onwards.</p>			
Other implications	The successful implementation of the project will also enable relevant services to access and use technology which is designed for their business areas and support better alignment with the upgraded finance system, in turn supporting better decision making for customer centred service delivery.			
Background papers considered	None			
Declarations/ conflict of interest? Declaration of other councillor/ officer consulted by the Cabinet member?	None			
0List consultees		Name	Outcome	Date
	Ward councillors	n/a		
	Legal legal@southandvale.gov.uk	Pat Connell	Subject to comments – incorporated in this version	29.6.2022
	Finance Finance@southandvale.gov.uk	Simon Hewings	Comments to clarify funding & savings expected – included in financial implications section	24/6/22
	Human resources hadminandpayroll@southandvale.gov.uk	David Fairall	Support – no further comments	23/6/22
	Climate and biodiversity climateaction@southandvale.gov.uk	Kimberly Hall	Support – outcomes will contribute towards the councils' climate change agenda	5/7/22
	Diversity and equality equalities@southandvale.gov.uk	Lynne Mitchell	Support – no further comments	23/6/22
	Health and safety healthandsafety@southandvale.gov.uk	Deborah Porter	Support - Improving service delivery and customer experience will reduce incidents of abuse and threat to council staff.	27.06.22

	Risk and insurance risk@southandvale.gov.uk	Allison Holliday	Agreed	23.06.2022
	Communications communications@southandvale.gov.uk	Shona Ware	Support – no further comments	27/6/22
	Senior Management Team ExecutiveSupportS@Southandvale.gov.uk			
Confidential decision? If so, under which exempt category?	No			
Call-in waived by Scrutiny Committee chairman?	No			
Has this been discussed by Cabinet members?	Use of a CRM system to improve customer services was approved by Cabinet in Nov 2021 - http://democratic.whitehorsedc.gov.uk/ieListDocuments.aspx?CId=507&MId=2854			
Cabinet portfolio holder's signature To confirm the decision as set out in this notice.	Signature  _____ Date 8/7/22			

ONCE SIGNED, THIS FORM MUST BE HANDED TO DEMOCRATIC SERVICES IMMEDIATELY.

For Democratic Services office use only		
Form received	Date: 12 July 2022	Time: 09:53
Date published to all councillors	Date: 12 July 2022	
Call-in deadline	Date: 19 July 2022	Time: 17:00

Guidance notes

1. This form must be completed by the lead officer who becomes the contact officer. The lead officer is responsible for ensuring that the necessary internal consultees have signed it off, including the chief executive. The lead officer must then seek the Cabinet portfolio holder's agreement and signature.
2. Once satisfied with the decision, the Cabinet portfolio holder must hand-sign and date the form and return it to the lead officer who should send it to Democratic Services immediately to allow the call-in period to commence.
Tel. 01235 422520 or extension 2520.
Email: democratic.services@southandvale.gov.uk
3. Democratic Services will then publish the decision to the website (unless it is confidential) and send it to all councillors to commence the call-in period (five clear working days) if it is a 'key' decision (see the definition of a 'key' decision below). A key decision cannot be implemented until the call-in period expires. The call-in procedure can be found in the council's constitution, part 4, under the Scrutiny Committee procedure rules.
4. Before implementing a key decision, the lead officer is responsible for checking with Democratic Services that the decision has not been called in.
5. If a key decision has been called in, Democratic Services will notify the lead officer and decision-maker. This call-in puts the decision on hold.
6. Democratic Services will liaise with the Scrutiny Committee chairman over the date of the call-in debate. The Cabinet portfolio holder will be requested to attend the Scrutiny Committee meeting to answer the committee's questions.
7. The Scrutiny Committee may:
 - refer the decision back to the Cabinet portfolio holder for reconsideration or
 - refer the matter to Council with an alternative set of proposals (where the final decision rests with full Council) or
 - accept the Cabinet portfolio holder's decision, in which case it can be implemented immediately.

Key decisions: assessing whether a decision should be classified as 'key'

The South Oxfordshire and Vale of White Horse District Councils' Constitutions now have the same definition of a key decision:

A key decision is a decision of the Cabinet, an individual Cabinet member, or an officer acting under delegated powers, which is likely:

- (a) to incur expenditure, make savings or to receive income of more than £75,000;**

- (b) to award a revenue or capital grant of over £25,000; or**
- (c) to agree an action that, in the view of the chief executive or relevant head of service, would be significant in terms of its effects on communities living or working in an area comprising more than one ward in the area of the council.**

Key decisions are subject to the scrutiny call-in procedure; non-key decisions are not and can be implemented immediately.

In assessing whether a decision should be classified as 'key', you should consider:

- (a) Will the expenditure, savings or income total more than £75,000 across all financial years?
- (b) Will the grant award to one person or organisation be more than £25,000 across all financial years?
- (c) Does the decision impact on more than one district council ward? And if so, is the impact significant? If residents or property affected by the decision is in one ward but is close to the border of an adjacent ward, it may have a significant impact on that second ward, e.g. through additional traffic, noise, light pollution, odour. Examples of significant impacts on two or more wards are:
 - Decisions to spend Didcot Garden Town funds (significant impact on more than one ward)
 - Changes to the household waste collection policy (affects all households in the district)
 - Reviewing a housing strategy (could have a significant impact on residents in many wards)
 - Adopting a supplementary planning document for a redevelopment site (could significantly affect more than one ward) or a new design guide (affects all wards)
 - Decisions to build new or improve existing leisure facilities (used by residents of more than one ward)

The overriding principle is that before 'key' decisions are made, they must be published in the Cabinet Work Programme for 28 calendar days. Classifying a decision as non-key when it should be a key decision could expose the decision to challenge and delay its implementation.