

GREATER LONDON AUTHORITY

REQUEST FOR MAYORAL DECISION – MD2180

Title: Replacement of the GLA correspondence management system (WriteON)

Executive Summary:

The correspondence system used by the Public Liaison Unit (PLU) and a number of other teams in the GLA is now ten years old and no longer fit for purpose.

Due to the system's age and specification it is difficult to update. This prevents the PLU team providing an exemplary service to Londoners.

This decision form asks for approval for expenditure to introduce a modern cloud-based customer relationship management (CRM) service, supporting processes that can be iteratively improved by the PLU team to enable them to provide world class citizen engagement.

Decision:

That the Mayor approves expenditure of up to £300,000 to build a best-in-class correspondence system, including all licenses, configuration, full staff training and system support for the first year.

Mayor of London

I confirm that I do not have any disclosable pecuniary interests in the proposed decision, and take the decision in compliance with the Code of Conduct for elected Members of the Authority.

The above request has my approval.

Signature:



Date:

26/10/17

PART I - NON-CONFIDENTIAL FACTS AND ADVICE TO THE MAYOR

Decision required – supporting report

1. Introduction and background

1.1 This request for expenditure follows a period of discovery investigation undertaken by the Senior Manager, Digital Transformation and the recommendations that followed have been agreed in principle by:

- Assistant Director, External Relations;
- Head of Paid Service;
- Chief of Staff;
- Mayoral Director External and International Affairs.

1.2 The Public Liaison Unit (PLU) team is the key front line interface between the GLA and members of the public in London. They deliver a high quality frontline information service that represents the Mayor and the GLA. Their remit includes responding to telephone queries, letters and emails from the public, People's Question Time requests and communication via social media. They also support Freedom of Information requests, official complaints and manage large-scale email campaigns and petitions. This frequently involves the handling of complex cases that need input and sign-off from a number of internal teams and other organisations within the GLA Group. They work with other communications professionals in the GLA to agree clearly communicable public statements on frequent issues of enquiry.

1.3 The team supports at least 3,000 cases a month, which peaked at nearly 4,000 after the Mayoral election. Currently one in six responses is outside the 20 working days target.

1.4 The WriteON system is a series of connected bespoke products created for the GLA in 2007. This system costs £42K a year to support but is based on outdated technology, is difficult to update and use.

1.5 The major issues with WriteOn that were highlighted include:

- The inability to remove users from the system that have left the organisation as this destroys existing audit trail - in turn this causes the system to be extremely slow;
- Out-of-date unalterable processes codified in the software;
- A difficult to use, dated user interface;
- Having to download, install and configure the system for each new user;
- GLA Technology Group having to maintain three contracts for different parts of the system:
 - a) WriteON itself from Pivotal;
 - b) The BASIS database system from Open Text;
 - c) PLU also pays 10% of the annual cost for the Business Objects reporting system.
- GLA Technology Group having to support the back-end components of the service on servers based in City Hall, as opposed to running them in the cloud;
- Difficulty linking together cases that relate to the same person, group or outcome;
- Lack of auditability of case work, especially an inconsistent process for Freedom of Information requests;
- The team having to spend time every day generating manual reports;
- If new reports are needed they must be built by an external supplier at £600 per day;
- No mechanism for collecting satisfaction data from citizens.

1.6 In turn this has contributed or lead to:

- Slow responses to Londoners contacting the GLA - approximately 430 (15%) outside the agreed SLA;
- Very low staff satisfaction with the system - a significant amount of everyone's time is wasted fighting the IT system that could be used helping Londoners;
- A considerable amount of work being done outside the system - contributing to a lack of auditability;
- Lack of adoption in other GLA teams who continue to rely on paper forms and email;
- The introduction of a large number of workarounds that have to be learned by any new member of the team.

2. Objectives and expected outcomes

2.1 This procurement is part of an overall transformation of the Public Liaison Unit's operating model. The transformation agenda includes team problem ownership, iterative and ongoing improvement of processes, active user research with Londoners, defining and producing better metrics to measure performance as well as greater collaboration with other teams in the GLA. A methodology of team continuous self-improvement will be put in place to fulfil the evolving set of user needs of Londoners who wish to contact the GLA.

2.2 The spend on the new system will cover a multi-stage process:

- a) The first will be to select and contract with a vendor partner who has substantial expertise in working with CRM products;
- b) The second will be the selection of an appropriate CRM and purchase of the required number of licenses for the PLU team. This will follow a period of discovery undertaken by our new partner organisation involving close collaboration with system end-users;
- c) The third will be configuration for the CRM product to ensure it is fit-for-purpose for PLU's needs as well as training the PLU team to be able to undertake any required changes to the system themselves in future. During this stage data from WriteON will be migrated to the new system;
- d) The final stage is ongoing second line support. This will also be provided by our selected vendor.

2.3 It is expected that the replacement for WriteON will be a cloud-hosted "software as a service" (SaaS) product. The work undertaken to configure it to facilitate the PLU team's re-engineered processes will be undertaken using Agile methodology. Part of this will involve the introduction of a new Product Owner role in the team to oversee the introduction of the system and its continued management.

2.4 The procurement for our partner organisation will be undertaken via and in accordance with the terms of the Government Digital Marketplace Digital Outcomes and Specialists framework.

2.5 Indicative costs for this piece of work are as follows. The one-off costs are based on an implementation team consisting of a Functional Lead, a Technical Lead, a Technology Architect and system specialists each only allocated to the project as required.

One-off costs

1. One month discovery piece: £60K
2. Three months implementation: £160K

Recurring costs

Ongoing support and maintenance costs will be contained within existing Public Liaison Unit's revenue budget subject to the annual budget setting process. These include the following:

- a) 20 cloud CRM licenses, 1 year: £20K;
- b) Annual 2nd and 3rd line support: £60K.

Initial total

2.6 The estimated initial cost of £300,000 for this project, including one year of licenses and support, will be funded from the Public Liaison Development budget that was approved as part of the 2017-18 budget process.

2.7 A method for measuring cost-per-transaction will be put in place before the system is deployed to measure the direct value of its introduction. In addition, a customer satisfaction metric will be designed to reflect the experience of Londoners sending queries to the GLA.

2.8 Key benefits of the new system will include the following:

Contractual

- Simplified and more efficient contract landscape

Usability

- Single customer view - brings together all forms of correspondence related to an individual Londoner (calls, letters, emails, social media)
- Browser based so easy to use and accessible from anywhere on laptops, tablets or phones
- Supports a variety of sign-off models to enable more flexible working

Efficiency

- Is able to be quickly and cheaply integrated into other software systems
- Enables categorization, prioritisation and linking together of cases
- Supports SLA countdown on cases to ensure targets are met
- Supports communication templates to improve standardisation of responses
- Enables production of custom reports by team members
- Future changes to team roles or processes can be updated in the system by the team themselves

Security

- Secure, resilient, scalable and auditable
- Is able to control access to personal data in line with the GDPR

2.9 The introduction of the new system will allow the PLU team to expand their internal digital channels to many other teams in the GLA. WriteON is available to the policy teams, the Mayor's Office and the Assembly Secretariat but understandably these groups are resistant to using it given its many issues. Having each team involved in a case using the same system will lead to better turnaround times, auditability, metrics and better service quality for Londoners.

2.10 Once the new system is in place and shown to be providing the PLU team with a substantial increase in team satisfaction and efficiency, the GLA Digital team, working with TG, will begin to investigate whether the same service can also be used in the various other teams that are considering their own CRM system. The advantages of expanding the system's use, such as further discounts on per-seat licensing and common core organisational skills, must naturally be balanced against ensuring that it fulfils the needs of any additional teams before further adoption.

3. Equality comments

- 3.1 The GLA and TfL are subject to public sector equality duties and any collaboration agreement and third party contracts entered into by the GLA will be consistent with these duties, and with the Mayor's strategies and plans, including associated equality impact assessments.
- 3.2 No adverse impacts are identified for the proposed programme described in this document.
- 3.3 In the future we will explore the consent-based collecting of demographic information of Londoners who contact the Public Liaison Unit to track how the requests of different groups are completed within the specified SLA agreements. This would be possible due to the ability to iteratively update the service as required. In addition, such demographic information could be used to identify groups of Londoners who do not regularly contact the GLA and could potentially benefit from further outreach.

4. Other considerations

- 4.1 The introduction of this system is part of the drive to evolve the PLU to deliver the Mayor's manifesto commitment: "I'm determined to lead the most transparent, engaged and accessible administration... and to represent every single community, and every single part of our city, as Mayor for all Londoners."
- 4.2 Notable project risks include the following:
- Project overspend: Mitigated by the Agile way of working and focus on delivering a minimum viable product. Costs will be based on feedback from suppliers. A very clear spec, detailing what we want and how we want it to be delivered, is being prepared;
 - Delivered system is not fit for purpose: Mitigated by the Agile way of working where the PLU team will be continually involved in the configuration of the system and all stakeholders will have opportunities to interact with it regularly at show and tells;
 - User needs too diverse: Mitigated by setting clear and realistic expectations, and ensuring we are clear on what the system MUST contain;
 - Poor response to tender, unable to attract supplier: Mitigated by ensuring all procurement documentation is clear and concise. We envisage bidders will be attracted to working with City Hall.
- 4.3 Consultations that will take place before and during the deployment of the system will include the following:
- The PLU team - continuously as part of the Agile way of working;
 - Current non-PLU users of the WriteON system such as the Mayor's Correspondence Team and policy teams;
 - The Information Governance team from an FOI perspective;
 - The GLA Technology Group;
 - Front-line correspondence-handling teams in other equivalent organisations, particularly in the public sector, such as TfL.
- 4.4 Success measures will include the following:
- Reduction in the approximately 430 (15%) of Londoner requests for information that fall outside of the agreed PLU SLA;
 - Reduction in the average time to process a case with ambitious estimates of the following:
 - a) 1-3 hours for social media queries

- b) 3 working days for online form and email queries
- c) 10 working days for letter queries
- d) 20 working days for FOIs (unchanged)
- Reduction in the number of cases where all or part of the processing is outside of the casework system;
- Channel shift from letters and calls to email, particularly for individuals who frequently contact the GLA;
- Reduction in the PLU cost-per-transaction;
- Better quality / more standardised responses to Londoners with similar questions;
- Higher quality / more frequent reporting;
- High reported process satisfaction of Londoners who raise questions to the GLA;
- Improvement in staff satisfaction in PLU.

5. Financial comments

- 5.1 The estimated cost of £300,000 for this project will be funded from the Public Liaison Development budget that was approved as part of the 2017-18 budget process. Any ongoing maintenance costs that may be payable will be contained within existing Public Liaison Unit's revenue budget subject to the annual budget setting process.

6. Legal comments

- 6.1 A Privacy Impact Statement (PIA) will be completed as part of the Discovery phase to ensure that the system is compliant with the GDPR. This will be reviewed with the Governance team.
- 6.2 The foregoing sections of this report indicate that the activity in respect of which approval is sought may be considered to be facilitative of and conducive to the exercise of the GLA's powers under section 30 of the Greater London Authority Act 1999 to undertake such activity as may be considered to promote economic development and wealth creation, social development and the improvement of the environment in Greater London.
- 6.3 The report indicates that officers have complied with the Authority's related statutory duties to:
- 6.3.1 pay due regard to the principle that there should be equality of opportunity for all people;
- 6.3.2 consider how the proposals will promote the improvement of health of persons, health inequalities between persons and to contribute towards the achievement of sustainable development in the United Kingdom; and
- 6.3.3 consult with appropriate bodies.
- 6.4 Officers have indicated in section 2.4 of this report that the:
- 6.4.1 framework under which it is proposed that the services required are to be called off can be used by the GLA by virtue of its procurement by the Government as a central purchasing body on behalf of the GLA and bodies such as the GLA in accordance with relevant procurement law; and
- 6.4.2 services required will be procured fully in accordance with the requirements of that framework.
- 6.5 Officers must ensure that appropriate call off documentation is put in place and executed by the successful bidder and the GLA before the commencement of the services.

7. Planned delivery approach and next steps

Activity	Timeline
Request for Proposal completed along with vendor scorecard, agreed with stakeholders and TfL procurement, submitted to the DOS framework	20/10/17
Potential vendors provide submissions, initial scoring takes place, top 5 are asked to present in person	3/11/17
Presentations take place, final scoring complete, vendor selection made, contract process starts	10/11/17
Contract complete, vendor on site	24/11/17
Vendor completes discovery piece	12/01/18
CRM selection, licence procurement	26/01/18
Vendor completes Agile project to implement initial configuration, data migration and training in conjunction with PLU team	18/05/18
End of initial development, support begins	18/05/18

Appendices and supporting papers: None

Public access to information

Information in this form (Part 1) is subject to the Freedom of Information Act 2000 (FOI Act) and will be made available on the GLA website within one working day of approval.

If immediate publication risks compromising the implementation of the decision (for example, to complete a procurement process), it can be deferred until a specific date. Deferral periods should be kept to the shortest length strictly necessary. **Note:** This form (Part 1) will either be published within one working day after approval or on the defer date.

Part 1 Deferral:

Is the publication of Part 1 of this approval to be deferred? YES

If YES, for what reason: Until procurement is complete

Until what date: 30 November 2017

Part 2 Confidentiality: Only the facts or advice considered to be exempt from disclosure under the FOI Act should be in the separate Part 2 form, together with the legal rationale for non-publication.

Is there a part 2 form – NO

ORIGINATING OFFICER DECLARATION:

Drafting officer to confirm the following (✓)

Drafting officer:

David Durant has drafted this report in accordance with GLA procedures and confirms the following:

✓

Sponsoring Director:

Martin Clarke has reviewed the request and is satisfied it is correct and consistent with the Mayor's plans and priorities.

✓

Mayoral Adviser:

Leah Kreitzman has been consulted about the proposal and agrees the recommendations.

✓

Advice:

The Finance and Legal teams have commented on this proposal.

✓

Corporate Investment Board

This decision was agreed by the Corporate Investment Board on 16 October 2017.

EXECUTIVE DIRECTOR, RESOURCES:

I confirm that financial and legal implications have been appropriately considered in the preparation of this report.

Signature

M. D. Clarke

Date

16.10.17

CHIEF OF STAFF:

I am satisfied that this is an appropriate request to be submitted to the Mayor

Signature

D. Bellamy

Date

16/10/2017.