

BRIEFING NOTE

TO: Corporate Scrutiny and Performance Panel
DATE: 25 October 2007

RE: Revenues and Benefits – Electronic Document Management System

Purpose

Update report to review the implementation and performance to date of the new Revenues and Benefits electronic document management system (EDMS).

Procurement and Implementation

The implementation of the above system was completed in just 41 days the fastest in the UK. The project was completed on time and in budget. All project objectives have been met and projected savings are on target to be made.

Impact on performance

Statistics released by central government for 2007 performance show Walsall's revenues and benefits team to be the most improved metropolitan team in the UK.

Benefits

- Improved efficiency through faster access to information
- Greater consistency in working practices through standardisation of process
- Increased quality of work due to staff compliance with policies and procedures
- Productivity gains from the automation of repetitive tasks
- Reduced cost of storage and retrieval of information and files
- Improved customer service through integrated front and back office and more efficient staff
- More open, transparent government enabling better public access
- The possibility of integrating into a corporate system
- Improved management information
- Reduced support costs i.e. printers and postage
- On target to achieve efficiency savings
- Improved staff morale
- Improved customer satisfaction – fewer complaints more compliments

Project Achievements

The project closed successfully on the 31 September 2007, some key highlights are:

- Achieving procurement of the EDMS System within a very short timescale.

- Installing and setting up the hardware, software and training the staff to enable phase one of the project (Benefits) to be completed within around 41 days duration post supplier selection.
- Both of the above ensured that Walsall Metropolitan Borough Council (WMBC) met the delivery criteria to achieve Department for Work and Pensions (DWP) funding
- Although there have been a number of technical issues encountered, all concerned have worked extremely well together in bringing them to a swift resolution.
- The EDMS system is used routinely by all Revenues & Benefits staff to access new and existing information.
- Documents are scanned and indexed daily.
- Workflow, priority management and case management are routinely used by Revenue & Benefits staff.
- Performance, efficiency, quality and service delivery have improved.

Other supporting activities undertaken include:

- The development of agreed system “ roll-out” / go-live plans- considering options, issues & risks resource availability
- Introduced the concept of phased training of staff whilst - back scanning their pending work – with the view of incrementally going live as the staff pass their proficiency test.
- Workshops to review “as is” processes in order to develop improved “to-be” processes that facilitate and deliver the objectives and requirements of the project business case. (e.g. First Stop Shop counter scanning and workflow options)
- The implementation of Counter Scanning was not in scope at the initiation of the project but was identified to deliver a real business benefit and implemented in parallel to the phase 2 delivering added value to the project.
- The internal training of the Revenues and Counter scanning staff has been very successful – achieving a high rate of competency and proficiency.
- Great credit should be given to WMBC staff who have continued to maintain a high momentum though out the project with moral amongst staff also remaining high in embracing the system and associated changes to their working practices.
- The project has remained on target throughout. It has also remained within Budget. After taking account of outstanding requirements there are still 25.5 consultancy days unused and available from Civica.
- From the outset of this project the sponsor laid down a clear objective for it to be run and perceived as exemplary and a future model for other WMBC projects. Based upon its management, success in delivery and little or no major deviation from plan and budget the project would appear to have met this objective.
- Business case savings are on target to be achieved.

Project Manager’s Summary

The Project timetable has now successfully come to an end.

The following actions have been identified as having the potential to provide even more efficiencies and have been incorporated into ongoing work plans:

- SX3 and Civica Recovery Suppression
- Hot Key Integration
- Suspension of Benefits

- Appeals, New Claim, & Revenues Workflows.
- Corporate General Filing
- Records Management
- Formscan modules to enable corporate integration

Conclusion

This has been an exemplary project which met all objectives resulting in real benefits to staff and the public.

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