

Report to:	Finance, Resources and Corporate Committee
Date:	7 March 2024
Subject:	Integrated Corporate Systems
Director:	Alan Reiss, Chief Operating Officer
Author:	Bill Cookson, ICT Project Manager

Is this a key decision?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Is the decision eligible for call-in by Scrutiny?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Does the report contain confidential or exempt information or appendices?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If relevant, state paragraph number of Schedule 12A, Local Government Act 1972, Part 1:	
Are there implications for equality and diversity?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

1. Purpose of this Report

- 1.1. To provide the Committee with an update on the Combined Authority project to implement Integrated Corporate Systems (ICS), including Finance, HR, and Payroll.

2. Information

Progress of the ICS Project

- 2.1. The Integrated Corporate Systems project was initiated to replace legacy and end-of-life HR, Finance and Payroll systems with one single integrated system. CiAnywhere was chosen as the system solution, and TechnologyOne who supply the product, were appointed lead implementation partner following the conclusion of an open procurement exercise in 2020. Work has been progressing with TechnologyOne developing and configuring the CiAnywhere product to the West Yorkshire Combined Authority's requirements.
- 2.2. CiAnywhere (abbreviated to CiA) stands for Connected Intelligence Anywhere. The name is derived from it being a cloud-based system. It provides a modern system

underpinned by workflows that provides effective and efficient processes and implements a high degree of self-service for all employees.

- 2.3. A key aim of the project is to have a completely integrated system, providing gains in efficiency, productivity, and quality of information. The new finance part of the system will aid multi-year budget and business planning, enabling the Combined Authority to plan budgets more effectively over future years, related to the delivery of outcomes. The HR and payroll parts of the system will resolve past issues of duplication of records, creating a single version of the truth with better accessibility of employee data. This will provide better and more accurate data to aid decision making. Recruitment will be conducted using CiA, which will enable a much more seamless process from vacancy creation through to employee induction. And a Talent and Succession module will aid learning and development, performance management, and progression.
- 2.4. Since the last report to the committee in March 2023, the Combined Authority has worked closely with the consultants at TechnologyOne to configure the CiAnywhere system to meet the needs of the Combined Authority. The guiding principle has been to 'adopt rather than adapt' as much as possible, refreshing our business processes to make full use of the efficiencies the system provides. Our previous ways of working were very much limited by the older disjointed systems.
- 2.5. Following the completion of the testing phase, data migration was completed to ensure the latest and most correct data was taken from the legacy systems and was set up correctly in the new system ahead of launch. During the deployment stage the project team also completed a campaign of staff briefings and engagement to raise awareness of CiAnywhere and the upcoming changes and new ways of working. A comprehensive suite of learning and support materials has been developed and shared with all staff in the form of an intranet learning hub, with guides and recordings of new business processes.
- 2.6. A CiAnywhere Network has been established within the Combined Authority to support with communications and direct colleagues to useful information and communications posted to the intranet page. Change champions within the CiAnywhere change network have been supporting communications to teams and have helped with unique questions and suggestions coming from different departments. Training sessions have been held with teams both in person and online, with sessions recorded for later reference and a focussed support and training plan is being developed for the go live period.
- 2.7. CiAnywhere underwent a 'soft launch' to a smaller group at the beginning of November 2023 and to the whole organisation on the 13 November 2023. The launch covered all of the finance module, payroll and parts of the HR module. The launch was a success, with more than 700 members of staff using the system within its first weeks and providing positive feedback in engagement sessions. Since launch there has been a period of 'hypercare' where there is priority support provided by TechnologyOne and support by the project team internally to resolve any teething issues. There have been

no major problems, and any minor issues arising were reviewed promptly and quickly addressed.

- 2.8. Further elements of the HR system were deployed from 2 January 2024. This includes booking of annual leave and a new recruitment process. CiA enables the recruitment process to be led by a manager, with the vacancy feeding directly from the organisation structure and the candidate experience from application to interview to appointment to onboarding being handled seamlessly.
- 2.9. A transition to business-as-usual arrangements is underway with the formal project handover scheduled for the end of February. Handover workshops are taking place between the consultancy team of TechnologyOne and their support teams, and with the project team at the Combined Authority. A steering group across Finance, HR, Payroll, and ICT Services to support continual CiAnywhere management and improvement has been established, chaired by the Director of Finance and Commercial Services, to complete phase 2 of delivery and to continue the future development of the product.

Future development and Benefits Realisation

- 2.10. TechnologyOne are committed to further developing the CiAnywhere system regularly and will issue bi-annual releases to bring new functionality and improvements. It is expected that the members of the project team will have assimilated the skills during the project to maintain the system going forward and to make controlled changes post go live to ensure the system can continue to be used efficiently and evolve with the organisation.
- 2.11. As part of the project closedown a closure report will be produced which will include a benefits realisation assessment. This is expected to be in two parts, with an immediate assessment at the point of project closure and a follow up later in 2024 to enable a measured assessment to be undertaken.
- 2.12. The Finance service will benefit by having tighter controls, reduced data entry, fewer dependencies on third party products and stronger version control with less scope for error. The chart of accounts production will be simpler and more consistent.
- 2.13. The HR service will be faster for all members of staff with a reduced need to handle activities by email with a greater self-service element. Reporting will be more detailed and for the first time there will be integration with payroll. There will also be an improved process for recruitment by tracking vacancies, and a single system for hiring and on/off boarding.
- 2.14. By bringing together Finance, Payroll and HR in a software as a service application, there will be numerous benefits by utilising a modern system with more availability, flexibility and regular feature improvements. The focus on shifting low level transactions away from specialist teams to individual staff members means that employees will be

more informed and empowered, and specialist teams will be freed up to focus on providing professional services. A brief summary of anticipated area benefits are listed below:

➤ **Flexible working capability**

Staff are enabled to access CiAnywhere from any location with an internet connection through a cloud-hosted application enabling greater flexibility and further supporting the organisation's agile working approach. The systems are expected to offer greater access to staff via mobile apps which will improve the digital exclusion for some staff who do not have access to corporate PCs or laptops.

➤ **The right tools for the job**

Staff have now been provided with a modern Finance, HR system, Payroll and Purchasing system which is powered by workflows that better support the business processes and offer self-service opportunities for both staff and managers.

➤ **Greater efficiencies**

CiAnywhere should reduce the current duplication of key records and further reduce the use of staff time, manual processes, paper and printing to reconcile differences across several systems.

➤ **Greater controls**

One organisational establishment for all employees on our payroll which will have controls with regards to how posts are created and how employees are added into posts. This will now feed across the HR, payroll and finance data to provide one version of the truth so identification of the proportion of the establishment filled, vacant posts, duplicate costs etc is easier.

➤ **Improved reporting**

Management information will be consolidated and based on the 'one version of the truth' which is timely, accurate and accessed across a range of formats leading to better reporting, management information, KPIs and business planning decisions.

➤ **Ease of maintenance**

We have replaced four legacy systems with one new system. This will be easier to maintain and will do away with a number of periphery subsystems which will be retired along with any required interfaces (such as AchieveForms for recruitment).

➤ **Future proof**

CiAnywhere replaces the legacy systems which were end of life and is actively being developed. This should be 'future proofed' and be easily expandable for future organisational growth. The supplier has committed to two major software releases every year and this is expected to unlock further opportunities for efficiencies to the organisation.

- 2.15. Over the next year, the use of CiA will be extended further when its assets module is used to manage information currently in two standalone systems. Transport assets (bus stops and shelters) are stored within “CoSA” (Combined Services & Assets) a large outdated system which has been operating for over 20 years and is in the process of being decommissioned. CiA will also be used to hold property data as well as ad hoc asset information stored in office documents. Bringing these asset records into CiA brings a number of benefits, including full integration with the organisation’s purchasing and finance system and better reporting.
- 2.16. The Talent and Succession module will be implemented in the first half of 2024, supporting workforce planning, progression, and development.
- 2.17. The next steps on Ci Anywhere and how it will be used in the next stages of organisational transformation will be set out in the Combined Authority’s Corporate Plan 2024-25, to be published in June.

3. Tackling the Climate Emergency Implications

- 3.1. The new system will provide better information and reporting to support decision making and evidence the outcomes being achieved.

4. Inclusive Growth Implications

- 4.1. The new system will provide better information and reporting to support decision making and evidence the outcomes being achieved.

5. Equality and Diversity Implications

- 5.1. The HR module will enable more detailed information on protected characteristics to be defined and reported on, and provide staff access to record these.

6. Financial Implications

- 6.1. The approved budget for the project is £1.72 million, and the project is forecasting to come in within this figure.

7. Legal Implications

- 7.1. There are no legal implications directly arising from this report.

8. Staffing Implications

- 8.1. There are no staffing implications directly arising from this report but noting that the project has provided a much-improved system to manage HR matters.

9. External Consultees

9.1. No external consultations have been undertaken.

10. Recommendations

10.1. That the Finance, Resources and Corporate Committee notes the progress on the implementation of CiAnywhere.

11. Background Documents

There are no background documents referenced in this report.

12. Appendices

None.