

**REPORT**

To: CORPORATE SERVICES COMMITTEE		Subject: ELECTED MEMBERS' CASELOAD MANAGEMENT
From: HEAD OF CENTRAL SERVICES		
Date: 10 January, 2012	Ref: JAF/IL	

**1. Purpose of Report**

1.1 The report is to advise the Committee of the present position in relation to the provision of a caseload management system for elected members.

**2. Background**

2.1 In September 2006 the Council accepted an invitation from the Improvement Service to participate in a pilot project with other Councils to develop a computer based recording and tracking system to make it easier and quicker for members to investigate and respond to enquiries from constituents. This pilot concluded in May 2008 and the Council was invited to adopt the system for an experimental period at no cost. It was, however, then ascertained that the data on the system would be hosted on a server which was not under the control of the Council. This was unacceptable, and the Council declined the invitation.

2.2 In June 2009 the Improvement Service again approached the Council to advise of a further project to provide a members' caseload management system as a members' portal of the Lagan system which is the current CRM system operated within the Council. The portal as initially developed did not meet the requirements of North Lanarkshire Council – but, as a result of significant additional work, adaptations had been made to the design of the portal with a view to meeting the Council's basic requirements.

2.3 Members are also reminded of previous reports to Committee of 20 January, 2010 and 8 October, 2010 when Committee approval was given to progress the implementation of the caseload management system for elected members based on the Lagan system.

**3. Considerations**

3.1 The Improvement Service project envisaged initially developing the system within one council and this was achieved in January, 2011. The Improvement Service was then in a position to extend the installation programme to remaining five local authorities involved in the initial pilot. The Efficient Government and Service Delivery team received Version 1 of the live system in mid-April, 2011. However, technical issues with the system were then identified and it was considered necessary that Kana, formerly known as Lagan, delay implementing any further installations until these issues were resolved with the live system. Due to this, it was considered necessary to purchase software for installation on to a test environment

3.2 Version 2 of the system was installed on to the test environment between 15 to 19 September, 2011. User acceptance testing is presently being undertaken by the Efficient Government and Service Delivery team and the Members' Services team. As part of the user acceptance testing some technical and operational issues remain to be resolved in conjunction with Kana. These issues are specific to searching for records and cases, consent issues, note attachments, intermittent e-form messages and technical issues when accessing maps.

The live system will not be implemented until all outstanding issues are resolved and user acceptance testing is complete.

3.3 When it becomes possible to proceed to implement the live system, a training programme will be established to include elected members and staff who will be using the members' portal.

3.4 In addition to the installation and set up costs of £7,400, an implementation cost of £5,700 was incurred in setting up the test system. These costs have been met from the Finance and Customer Services Budgets.

The ongoing maintenance costs for the members' portal is £2,250 per annum and there are also ongoing maintenance costs for the test environment. It is considered necessary to maintain the test environment to enable further development of the system which is anticipated to be required in line with experience of the operation of the live system.

#### 4 **Recommendation**

4.1 It is recommended that the Committee notes the report meantime and authorises the Head of Central Services and officers involved to continue to develop the members' caseload management portal.

  
**Head of Central Services**

*Members seeking further information on the contents of this report are asked to contact John Fleming, Head of Central Services on Extension 2228.*