

## OFFICER DECISION RECORD 1 FORM

This form should be used to record Officer Decisions in Excess of £100k (but below the key decision threshold), or where required by Financial, Contract or other Procedure Rules or following formal delegation from Cabinet or a Cabinet Member or a Council Committee.

**Decision Reference No:** e.g. Directorate/Ref No/Year - CR/318/03/19

**BOX 1**

**DIRECTORATE:** Corporate Resources      **DATE:** 15/02/19  
**Contact Name:** Mo Tanveer, Systems      **Tel. No.:** 01302 735133  
Analyst, CRM Project Manager  
(Corporate Resources)

**Subject Matter:** Capital funding for the upgrade of Lagan the corporate Customer Relationship Management system.

**BOX 2****DECISION TAKEN**

To approve the purchase of an upgrade for the organisations Customer Relationship Management system. Upgrading of the infrastructure hosting the CRM (Lagan) environment and preparation for software upgrade.

**BOX 3****REASON FOR THE DECISION**

The CRM system is heavily utilised by Customer Services as well a number of different services throughout the council The current CRM system is long overdue an upgrade to the latest version. The council procured its current CRM solution (Lagan) in 2012 and has been utilised as a central point of digital developments, communication and relationship management for customers, residents of Doncaster, Doncaster Council staff and its partners.

The council's current version of Lagan (version 8) is out of date and is running on best endeavour support with the supplier. Upgrading to (version 15.4), will provide a supported version and it will remove a number of critical issues that are caused by the current version.

Additional reasons for the decision are:

- A CRM system & integrations which are fully supported
- Improving the organisations PSN compliance due to java & browser compatibility

- Removing current PSN compliance issues relating to the CRM
- Provide additional features which can be leveraged in future Digital Transformation projects

This option utilises a path of least resistance considering time and cost, as the procurement route is via the incumbent provider and contract.

#### **BOX 4**

##### **ALTERNATIVE OPTIONS CONSIDERED AND REJECTED**

Do nothing: Accept the risk of best endeavour support on a dated version, security and functionality implications. This option was not considered viable due the risk implications being unacceptable.

Do everything: Complete a full tender and procurement exercise in the market place. This option was not considered viable due to the large cost and resource demand implications against the current operational climate.

#### **BOX 5**

##### **LEGAL IMPLICATIONS**

Section 1 of the Localism Act 2011 provides the Council with a general power of competence, allowing the Council to do anything that individuals generally may do. Section 111 of the Local Government Act 1972 gives an Authority power to purchase goods and services.

The report author should be aware of the original advertised scope of the contractual terms and consult legal services prior to legally committing to this purchase if the upgrade is outside scope, as there may be procurement risks to consider.

The Council's constitution must be adhered to including CPRs and FPRs.

**Name: Paula Ablett** signature: **By email** \_\_\_\_\_ **Date: 04/03/19** \_\_\_\_\_

Signature of Assistant Director of Legal and Democratic Services (or representative)

#### **BOX 6**

##### **FINANCIAL IMPLICATIONS:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Name: Paul Holgate**      **Signature: By e-mail**      **Date: 21/02/2019**

Signature of Chief Financial Officer and Assistant Director of Finance (or representative)

**BOX 7****Procurement Implications**

The current contract with Lagan details information regarding future upgrades. There are no procurement implications associated here.

Name: Andrea Gater Signature: [REDACTED] Date: **6.03.19**

Signature of Assistant Director (or representative)

**ANY IMPLICATIONS SENT TO DEPARTMENTS SHOULD GENERALLY BE SUBMITTED AT LEAST 5 WORKING DAYS IN ADVANCE TO ENSURE THESE CAN BE GIVEN THE RELEVANT CONSIDERATION.**

**BOX 8**

**EQUALITY IMPLICATIONS:** (To be completed by the author).

Decision makers must consider the Council's duties under the Public Sector Equality Duty at s149 of the Equality Act 2010. The duty requires the Council, when exercising its functions, to have 'due regard' to the need to eliminate discrimination, harassment and victimisation and other conduct prohibited under the act, and to advance equality of opportunity and foster good relations between those who share a 'protected characteristic' and those who do not share that protected characteristic. There are no specific equality implications arising from this decision

**BOX 9**

**RISK IMPLICATIONS:** (To be completed by the author)

Decision makers must consider the following risks if project is not delivered:

- A loss of opportunity improving the organisations PSN compliance due to java & browser compatibility
- Failure in removing current PSN compliance issues relating to the CRM
- A loss of opportunity to provide additional features which can be leveraged in future Digital Transformation projects
- A loss of opportunity to allow CRM system & integrations which are fully supported
- A loss of opportunity to have a fully trained workforce

**BOX 10  
CONSULTATION**

The consultation has included individuals from Finance, procurement, legal and IT so that the CRM upgrade is delivered in align with any implications and taking into consideration the project deliverables and outcomes.

**BOX 11  
INFORMATION NOT FOR PUBLICATION**

**Publish in full**

It is in the public's interest to be aware of this decision under the Freedom of Information Act 2000, therefore this record will be published redacting signatures & financial information from Box 2 and 6 as this is commercially sensitive information.

**Name: Holly Blake Signature H.Blake Date: 15.03.19**

Signature of FOI Lead Officer for service area where ODR originates

**BOX 12  
BACKGROUND PAPERS**

Please confirm if any Background Papers are included with this ODR NO

(If YES please list and submit these with this form)

**BOX 13  
AUTHORISATION**

**Name:** Julie Grant **Signature:** 

**Date:** 12<sup>th</sup> March 2019

Assistant Director of Customers, Digital & ICT

**Does this decision require authorisation by the Chief Financial Officer or other Officer**

**YES**

**If yes please authorise below:**

**Name:** Robert Smith

**Signature:** FM – FP&C

**Date:** 13.03.19

On behalf of Chief Financial Officer & Assistant Director of Finance

**Consultation with Relevant Member(s)**

**Name:** \_\_\_\_\_ **Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Designation** \_\_\_\_\_

(e.g. Mayor, Cabinet Member or Committee Chair/Vice-Chair)

**Declaration of Interest YES/NO**

**If YES please give details below:**

**PLEASE NOTE THIS FORM WILL BE PUBLISHED ON THE COUNCIL'S WEBSITE IN FULL UNLESS IT CONTAINS EXEMPT OR CONFIDENTIAL INFORMATION.**

Once completed a PDF copy of this form and any relevant background papers should be forwarded to Governance Services at [Democratic.Services@doncaster.gov.uk](mailto:Democratic.Services@doncaster.gov.uk) who will arrange publication.

**It is the responsibility of the decision taker to clearly identify any information that is confidential or exempt and should be redacted before publication.**