

# Oracle Improvement Programme Update

Scrutiny & Overview Committee  
23 July 2024

# Why we are here

- Oracle HR Finance and Procurement system implemented in 2019
  - Minimum viable configuration
  - Did not take full advantage of what was available
  - Development team stood down post go-live
- Only essential updates since
- Oracle has been enhancing the applications on a quarterly basis
- Summer 2023 maturity assessment – a long way from best practice
- Council still operating many manual systems, relying on off system reporting, compliance issues.....
- Finance, Procurement and HR business cases approved in March and June 2024

# Guiding Design Principles

Start with the **Oracle recommended “best practice”** processes and configuration.

**“Adopt not Adapt”** this may mean changing our process need to change to work with the system – do not bespoke the system to match our process.

Move to **“on system”** processes where possible.

The system should **record sufficient detail** to support processes.

**Data not to be stored outside of the system** (e.g. on spreadsheets, emails etc).

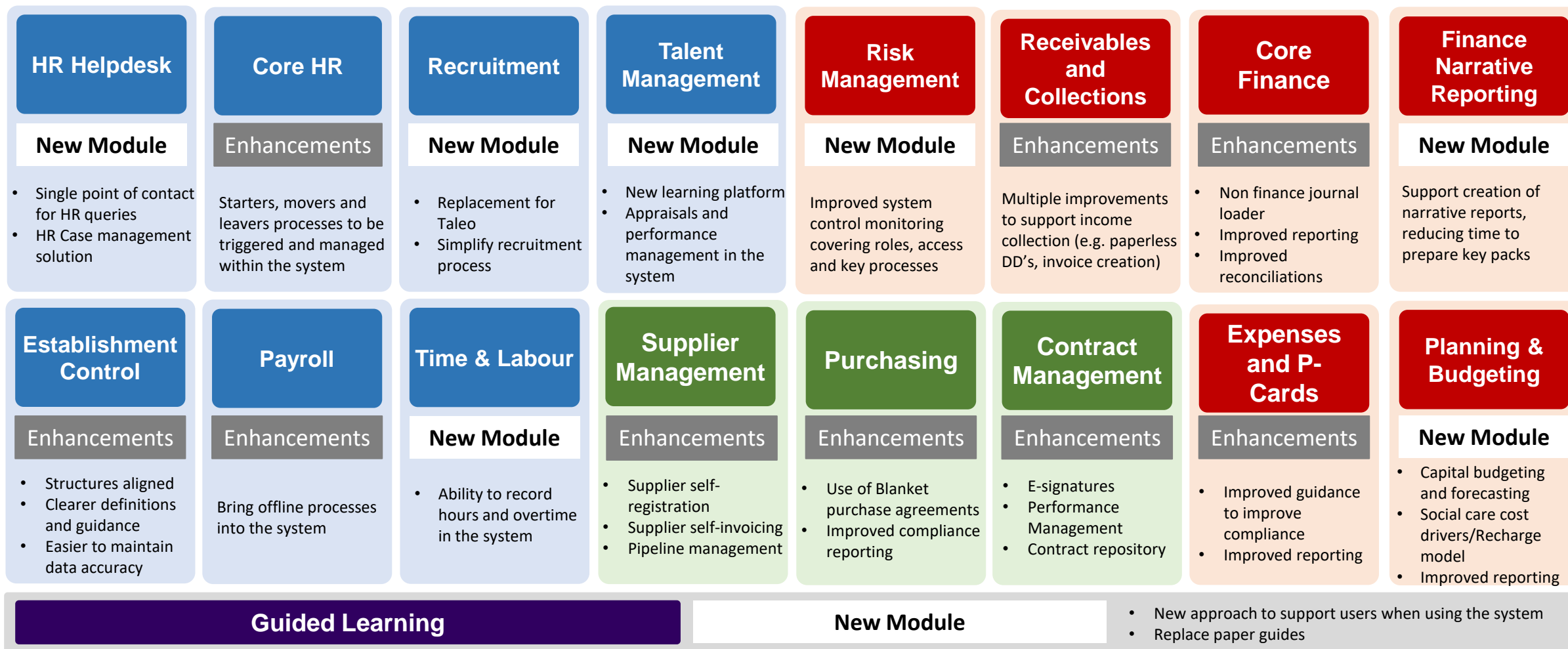
Management and Business Information to be made available through **dashboards**.

Avoid the need to re-key data, **automate and use AI** where possible.

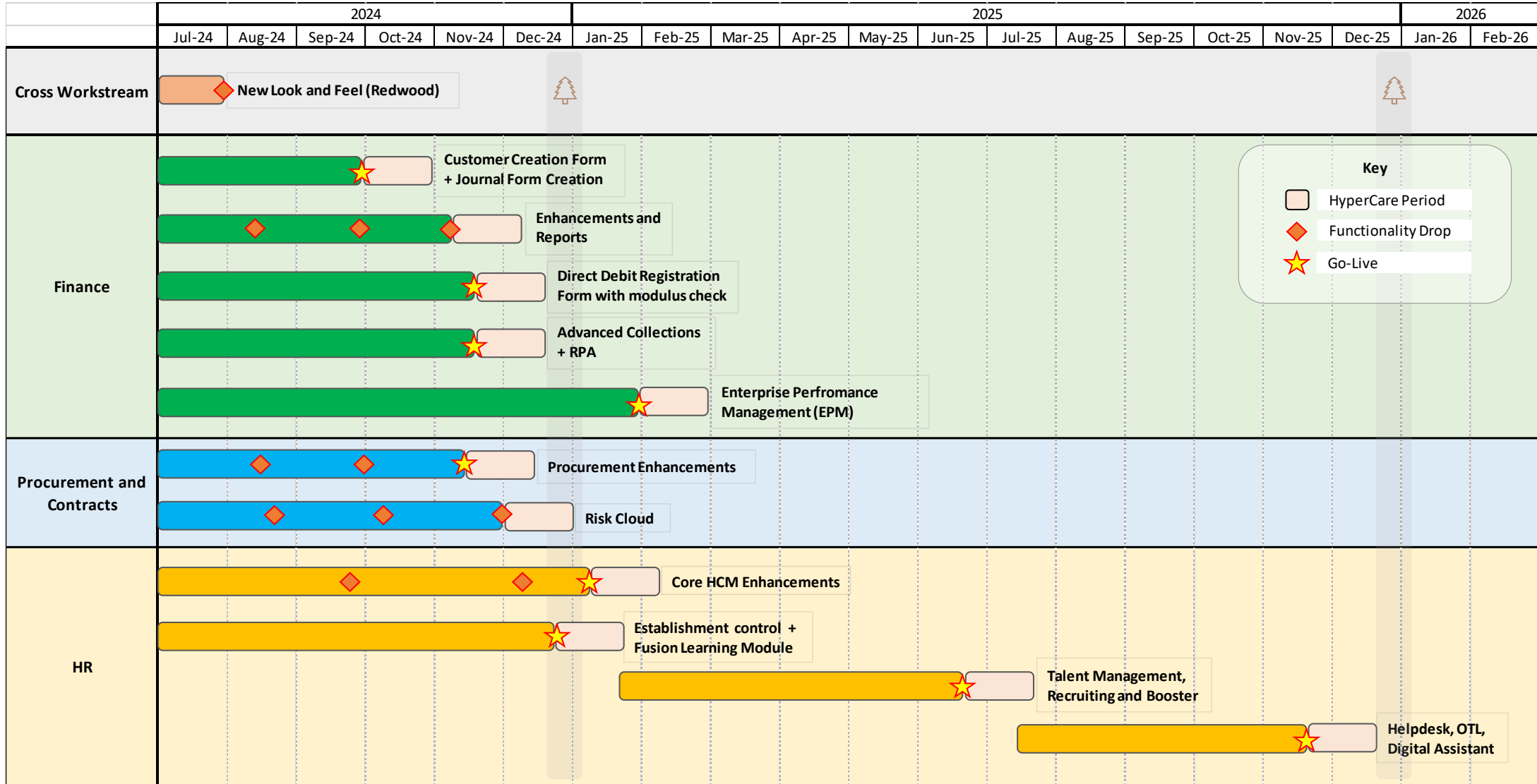
We need to be the **most cost effective and efficient** council in London .

**Increasing value** from the investment in the system.

# Overview of programme scope

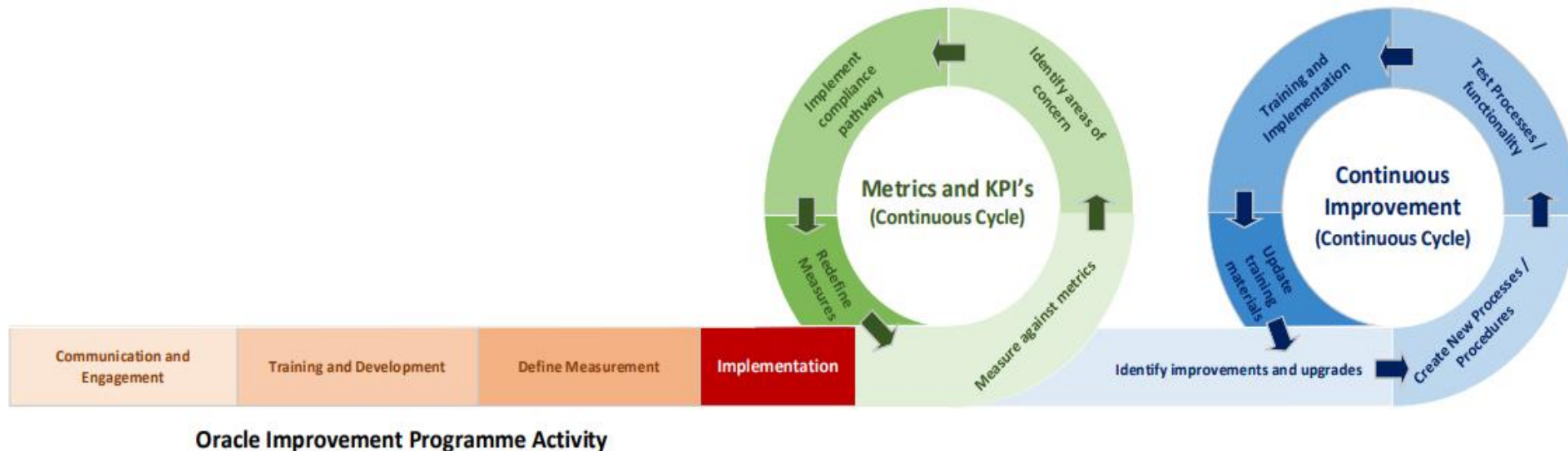


# Programme plan on a page



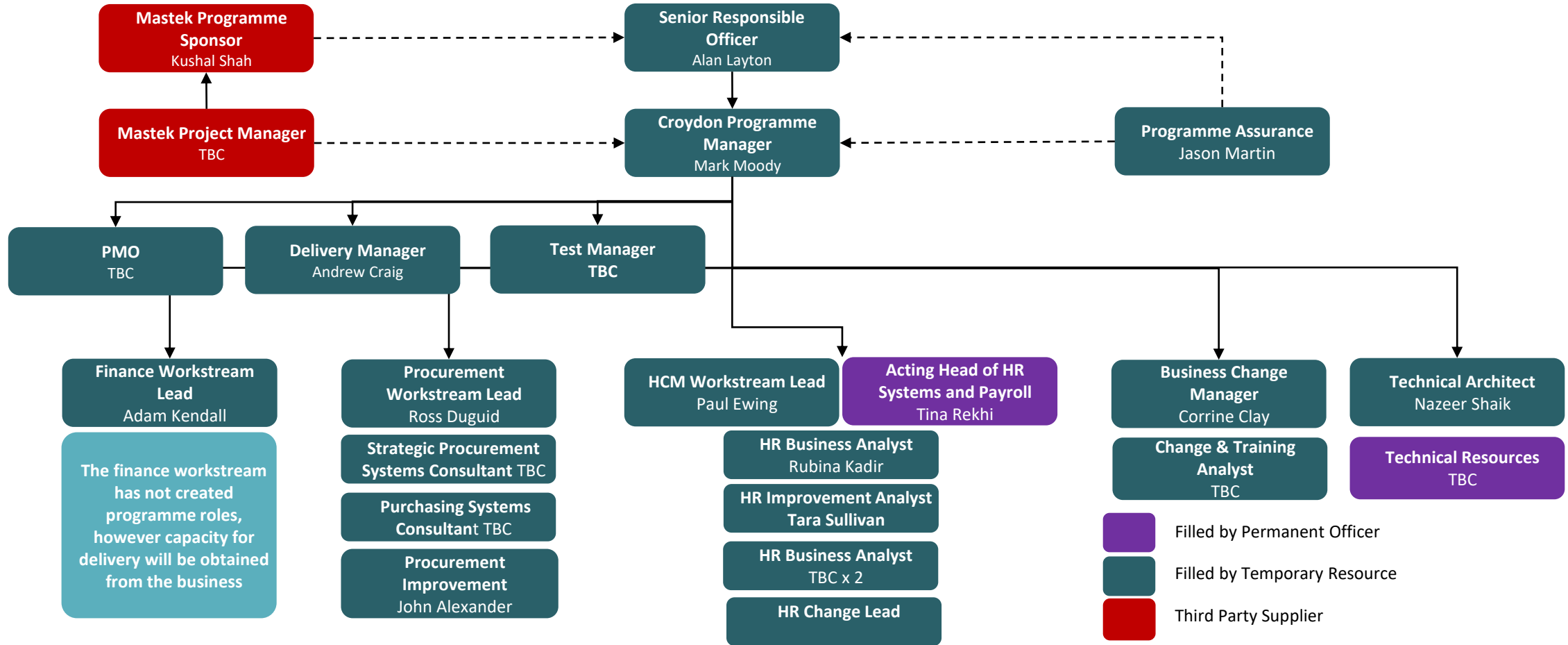
# Change Management

- Significant change to current ways of working and behaviours
- Only be successful if the business process improvements enabled by the programme are thoroughly embedded into the business.
- Change activity for the programme has three main components: Oracle Improvement Programme Change Activity, Metrics and KPI Activity and Continuous Improvement Activity

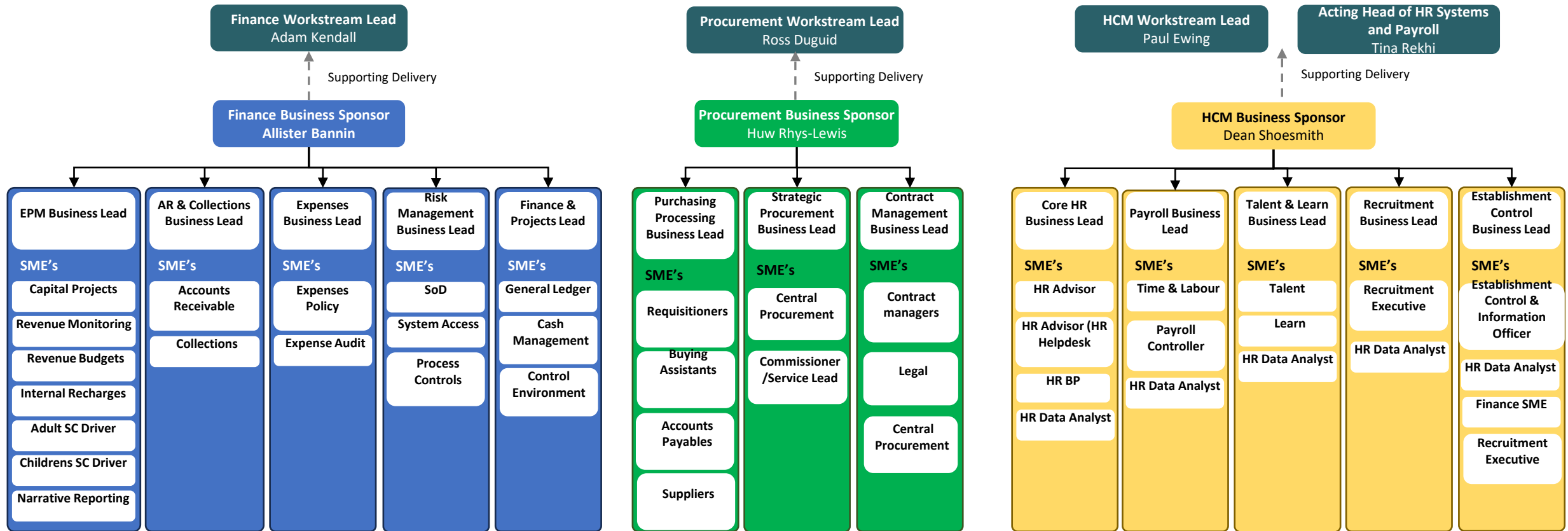


# Programme delivery team structure

The three business cases have obtained approval to recruit to a core programme team to support the business in delivering the programme. The diagram sets out the current structure, resources in post and positions which are currently vacant and require recruiting to.



# Proposed business delivery structure



Named individuals will be identified for each of the roles.



# Delivery roles and responsibilities

Workstream Lead	Business Lead	Subject Matter Expert
To lead the planning and management of all activities for their workstream in line with the agreed timescales.	Lead the enhancements of Oracle Fusion and the development of underlying business process within their business area.	Process experts and who will become specialists in the operation of the system.
Provide progress reporting to the Programme Manager as per the agreed timescales and format	Ensure the solution is delivered in line with the agreed guiding principles.	To work under the guidance of an Mastek consultant to configure the solution in line with the agreed guiding principles.
Ensure all workshops include staff with the required expertise to enable effective design decisions to be made.	Ensure the solution meets requirements of the business area and delivers benefits that have been agreed by the business case.	Experts of their specific subject areas, knowing in detail the current processes and business requirements to be fulfilled using the Oracle Fusion applications in their subject areas.
To effectively manage issues and risks associated to their workstream area, escalating as required to the Programme and/or Steering Group.	To ensure all agreed actions from the design activities for their business area are completed as per the agreed timescales.	Assist with the compilation, approval and maintenance of all user documentation\manuals.
Provide overall management of the Design Gaps and Change Requests for the workstream ensuring they are progressed and resolved within the required timescales.	Approval, submission and presentation of any change requests to the Design Authority.	Participate in all required advisory and design workshops including supporting the completion of all actions within the required timescales.
Provide overall management of the workstream testing activities as per the agreed timescales.	Support the completion of all testing activities for their business area as per the agreed timescales.	To assist with the development of testing materials (test scripts, expected results) and undertake testing.
Provide overall management of the workstream data migration and data cleanse activities (if required) as per the agreed timescales.	Support the completion of all data migration and data cleanse activities for their business area as per the agreed timescales.	Support the data migration and data cleanse activities for their subject area as required.
To lead the communication and engagement across the workstream and to champion the change.	Makes decisions and approves business process changes (including package configuration designs) required as a result of adopting the best practice Cloud solution.	Promote, drive and support the business change within their services (e.g. supporting communication and engagement locally)

# Financial Cost

- Capital expenditure funded from one off reserves £7.2m
- Transformation funded £0.9m for design
- Finance, HR and Procurement workstreams
- Programme management
- Change management
- Contingency

	2024-25 £'000	2025-26 £'000	Total £'000
Procurement workstream	620.7	120.0	740.7
Finance workstream	829.5	400.5	1,230.0
HR workstream	1,742.0	1,580.0	3,322.0
HR design	113.0		113.0
Programme & Change Management	1,113.7	904.7	2,018.4
<b>Sub total</b>	<b>4,418.9</b>	<b>3,005.2</b>	<b>7,424.1</b>
Contingency			350.0
<b>Total</b>			<b>7,774.1</b>
Remaining budget previously approved			(530.0)
<b>Net funding approved</b>			<b>7,244.1</b>

# Benefits Summary

- **Main Benefits**

- key data is held on system,
- single version of the truth from one system,
- strengthening data retention, data security, and improving audit trails.

- **Finance:**

- Improved revenue and capital budgeting and forecasting
- Improved income collection
- Stronger financial controls

- **Procurement:**





- Improved control of purchase orders
- Improved compliance with purchasing processes
- More effective sourcing and management of contracts

- **HR**

- All activity across the employee lifecycle will be managed in the system
- Stronger control of the establishment
- Reduced admin burden on employees, managers and HR teams.

- Also enables cashable savings planned for HR and procurement and contract management and a key foundation for the Future Croydon Plan.

# Key Risks

Risk	Mitigations	Residual Risk
There is a risk that our scope and ambition of the programme is not widely understood.	<ul style="list-style-type: none"> <li>• Ensure that the scope and ambition is clear and agreed with suppliers and business owners.</li> <li>• Business owners must take ownership of outcomes and ambition of the programme.</li> <li>• Key suppliers to attend programme governance meetings.</li> </ul>	
The key business changes enabled by the programme are not understood and fully adopted across the Council.	<ul style="list-style-type: none"> <li>• Business change is effectively planned, resourced, delivered and agreed by all.</li> <li>• Continuous improvement and a sustainable support model will be developed as part of the core objectives of the programme.</li> <li>• The People and Cultural Change Strategy must be inextricably linked with the Programme's Business change activity.</li> <li>• The consequences of noncompliance must be unambiguous with support from appropriate training materials.</li> </ul>	
Competing demands across the organisation	<ul style="list-style-type: none"> <li>• The Programme's key milestones are developed, and interdependencies confirmed, following wide consultation across the organisation.</li> <li>• Programme board will keep this risk under constant review and will work with the Corporate Management Team to manage any inter-dependencies.</li> </ul>	
There is a risk that knowledge may not be transferred from the programme team to Croydon Staff	<ul style="list-style-type: none"> <li>• Backfill of key Croydon resources to allow them to work on the programme.</li> <li>• Updated documentation and training is delivered as part of the Programme</li> </ul>	

# Personas



July 2024



# What it Means to me - Manager



## Current

## After Improvements

- ☹️ Most of the recruitment processes are undertaken manually and I am unable to track the progress of my recruitment or understand the actions I need to take throughout the process. Shortlisting, screening and selection are all undertaken off system.
- ☹️ My establishment data is often incorrect and does not include any of my agency staff. I often have duplicate or missing posts and I must complete manual forms to get this information corrected. Due to the manual processes, it takes a long time for these changes to be reflected in my establishment
- ☹️ I am unable to view resourcing for my whole team as my contingent workers do not show on the system. Leave for my team is managed via a spreadsheet and not within the system, which makes it difficult to manage my resource and understand what actions I need to take
- ☹️ Overtime and additional hours for my team is managed via spreadsheets and I find it difficult to keep track of what hours each staff member has worked and claimed. Insufficient guidance for employees around expenses, means I spend a lot of my time reviewing and rejecting incorrect claims
- ☹️ Appraisals are not comprehensive and are managed off-system which is difficult to do.
- ☹️ I have little overview of my contract information and do not consistently manage the performance of my contracts. I have no clear sight of my procurement activity and find it difficult to monitor the progress of my procurements .
- ☹️ I am unable to effectively manage my contracts as I have no data around when the contracts expire or the current activity against them. I am unable to effectively monitor my contract spend and often contracts expire causing issues and delays in the purchasing process
- ☹️ There is no clear process in place for forecasting and many of the forms I need to complete are located in different locations off of the system, making the process difficult to navigate. I am unable to review my historical forecasts and commentary to understand how my budget has changed or effectively align my budgets from year to year
- ☹️ I manage too many budgets and do not have the time to dedicate to each one to ensure that I am managing it correctly

- 😊 All recruitment processes are undertaken in one place. I can monitor the progress of my recruitment and keep track of my responsibilities throughout the process. I can screen, select and shortlist candidates within the system and feedback on candidates using quick questionnaires and notes.
- 😊 I can review and monitor my establishment (including agency workers) with confidence that the data provided is accurate and up to date. Where I identify inaccuracies, I can make changes within the system to correct these, knowing that the appropriate approvals are in place.
- 😊 I can review resourcing across my team at a glance (including contingent workers) and manage their work schedules. I can record and have visibility of absence within my team in real time and the system will alert me if there are triggers for action which I need to complete
- 😊 I automatically receive approval requests for, expenses, overtime and additional hours from members of my team and have the ability to request additional information if required. The improved expenses guidance has reduced the number of incorrect claims I have to manage
- 😊 I can record my employee's objectives within Oracle, making it simpler to review and track progress and schedule regular meetings
- 😊 I get regular dashboards that provide information on the performance of my contracts, the status of my planned or live procurements and compliance to the purchase to pay process, all in one place. This really helps to identify key areas I need to focus on and address
- 😊 I have better control over my contract spend and expiry dates. The system will not allow me to continue to raise orders once I go above the agreed contract value or beyond the term, unless I have agreement to do this. I get notifications well in advance where this is at risk of happening.
- 😊 There is a clear and straightforward process in place to enable me to accurately forecast against my budget, with fit for purpose links and forms to enable me to complete the process. I am able to view my historical forecasts and any commentary previously entered to ensure that my current forecasting reflects and aligns with historical data
- 😊 The re-alignment of budget managers ensures that my financial management workload is manageable allowing me to effectively monitor and manage the cost centers I am responsible for



# What it Means to me - Employee



## Current

- ☹️ It's difficult to find the information I need within the current Oracle environment.
- ☹️ I am concerned that my leave may not be recorded correctly. I don't have control myself in recording my sick leave and am worried it doesn't all get recorded.
- ☹️ If I leave the Organisation my manager needs to complete a leavers form, which is sent through to HR and Payroll for action, if there is a delay in processing the form, I may not get paid correctly
- ☹️ I can view internal vacancies on the intranet, if I apply for a position, I must complete a complex application form even though I am already an employee. I am unable to track my application and very rarely receive feedback from the Hiring Manager
- ☹️ Appraisals and 1-2-1s are managed off-system making it difficult to do.
- ☹️ The process for adding new suppliers within Procurement is time consuming as we need to request the information from the supplier and then enter it all onto the system. The approval process for my requisitions is slow and where staff are on leave some requisitions can get stuck in the system.
- ☹️ I only raise a few requisitions a year and every time I go into the system I forget the steps that I am supposed to follow. I know that there are guidance documents available, but it means I have to come out of the system to review the document or often have to swap back and forward between the two screens

## After Improvements

- 😊 Navigation is intuitive and accessible, and I can find my information, payslip and tasks I need to complete.
- 😊 I have confidence that it is correct as it is calculated based on my position and work schedule. I can enter my leave on the system, and it will go directly to my line manager for approval. Where I am off sick my manager can enter and manage my sickness absence for me within the system, to ensure that key tasks are completed and that my pay continues to be calculated correctly
- 😊 If I leave the Organisation, I will be entered into a leavers process and can be confident that I will not be over or underpaid upon exiting.
- 😊 I can view vacancies on various job boards and if I apply for internal vacancy, my application process will be smooth, and I will be able to track my application online. If unsuccessful I will receive feedback from the Hiring Manager
- 😊 My objectives will be entered into the Oracle system, I can track and review my progress against them along with my Line Manager/
- 😊 I like the use of supplier self registration to onboard new suppliers is much more efficient than the previous process where we had to request and enter information ourselves. The approval process for my requisitions is also quicker.
- 😊 As a requisitioner, I really like the Oracle Guided Learning. It provides hints and tips at key points in the purchasing process, so we input the right information first time. I know my procurement colleagues also like it as they have far fewer queries.



# What it Means to me - Supplier



## Current

- ☹️ When registering as a supplier with Croydon I receive an email requesting my information and then I have to wait until they have entered me onto the system before I can start any work or get paid
- ☹️ I am unable to view the pipeline procurement activity for the Council, which means I have very little time to prepare and plan my tenders, often leading to me under or over valuing my tender
- ☹️ I have been working as a supplier for Croydon for a long time. It can often be difficult getting my invoices paid on time particularly when purchase orders were not raised in advance

## After Improvements

- 😊 I am able to self register as a Supplier on Croydon's Supplier Portal, and I will receive training and guidance documents to assist me in the process
- 😊 I now get visibility of the up-to-date pipeline of all planned procurements well in advance. This allows me to plan properly to tender for these so I can put my best bid forward.
- 😊 With the new system I can only enter my invoice details on the system if a PO for the right value already exists. I make sure I do not start work until the PO is in place. This has greatly improved the process and my experience