

CSG SCHOOLS HR SERVICE UPDATE

1. Executive Summary

- 1.1 On 1st April 2014 the Councils Schools HR service was relocated to Carlisle as part of the planned CSG transformation improvements and contribution to the £126m of savings that Capita committed to within the CSG contract. A local presence was also maintained in Barnet to provide schools with employee relations advice and forums and user groups with schools.
- 1.2 As part of this transformation, a new a new HR system was introduced called “My View”. At the Performance and Contract Management committee on 23 July 2014 it was highlighted that a number of issues with the new system had been reported by schools, in particular in relation to its functionality, usability and the time taken to complete actions. There was a perception that the system had not been adequately tested and that schools now found it harder and more time consuming to find and input data. CSG was therefore asked to report back to this committee with further information on the issues and to set out what improvements have been implemented or progressed.
- 1.3 This report sets out the background and provides an update on these matters raised at the Performance and Contract Management Committee meeting of 1st September, along with timeframes for their resolution.

2. Background

- 2.1 There were a number of drivers for the move of payroll administration to Carlisle and the implementation of the new “My View” system, these included:
 - **Flexibility** – the Carlisle centre is a national centre of excellence for Capita HR Schools services and by using it for the provision of services for Barnet we are able to offer flexible staffing based on demand, provide greater resilience and pass on the benefits of existing experience and platforms
 - **New Technology** – Service enhancements through the use of wider capacity processes and systems, specifically the MyView modules, will help automate previously manual processes and self-service reporting will allow schools to access information more effectively and quickly.
 - **Cost savings** – The CSG contract is already contributing £126m towards the Council’s current MTFs savings including significant savings as a result of reducing manual tasks and reducing the calls and operating costs of the HR service.

- 2.2 The outcome of the HR Schools Service transformation is to ensure that those schools who can self serve do so and that those schools who still need to call Capita get an efficient, high quality service where the person that they speak to knows who they are, understands the history of the issue or enquiry and owns the completion of their enquiry as far as possible.

3. Reported issues

- 3.1 The schools fed back that there were a number of issues with the new systems, these included:
- Processing transactions in MyView took too long – (e.g. timesheet input/ navigation of system)
 - Schools wanted closer engagement on system developments
 - Schools wanted one user log–on for the 2 systems, ResourceLink and MyView
 - Schools wanted the staff establishment list reports as previously provided
 - Schools wanted access to additional information , for e.g. (continuous service of staff), and
 - Schools wanted visibility of the named Schools Business Manager

4. Context

It should be noted that as part of the aim of the transformation we were seeking to remove manual processes and paper entries as processing these caused delays for the schools and naturally led to more errors.

5. Mitigating actions

CSG committed to address all the issues and to develop a closer working with school representatives through:

- A Newsletter specifically addressing the issues prior to the 2014 summer closure, explaining developments in progress and dates when these will be available. This was issued on 8th September.
- A review of the system with service users to determine further improvements in system configuration, this was undertaken at St Marys CE High School 24 July 2014
- Establishing a Forum with group of school representatives from September 2014 to discuss service improvement implementation Some Super Users from schools volunteered to work with us to help identify issues and ensure all captured and in progress

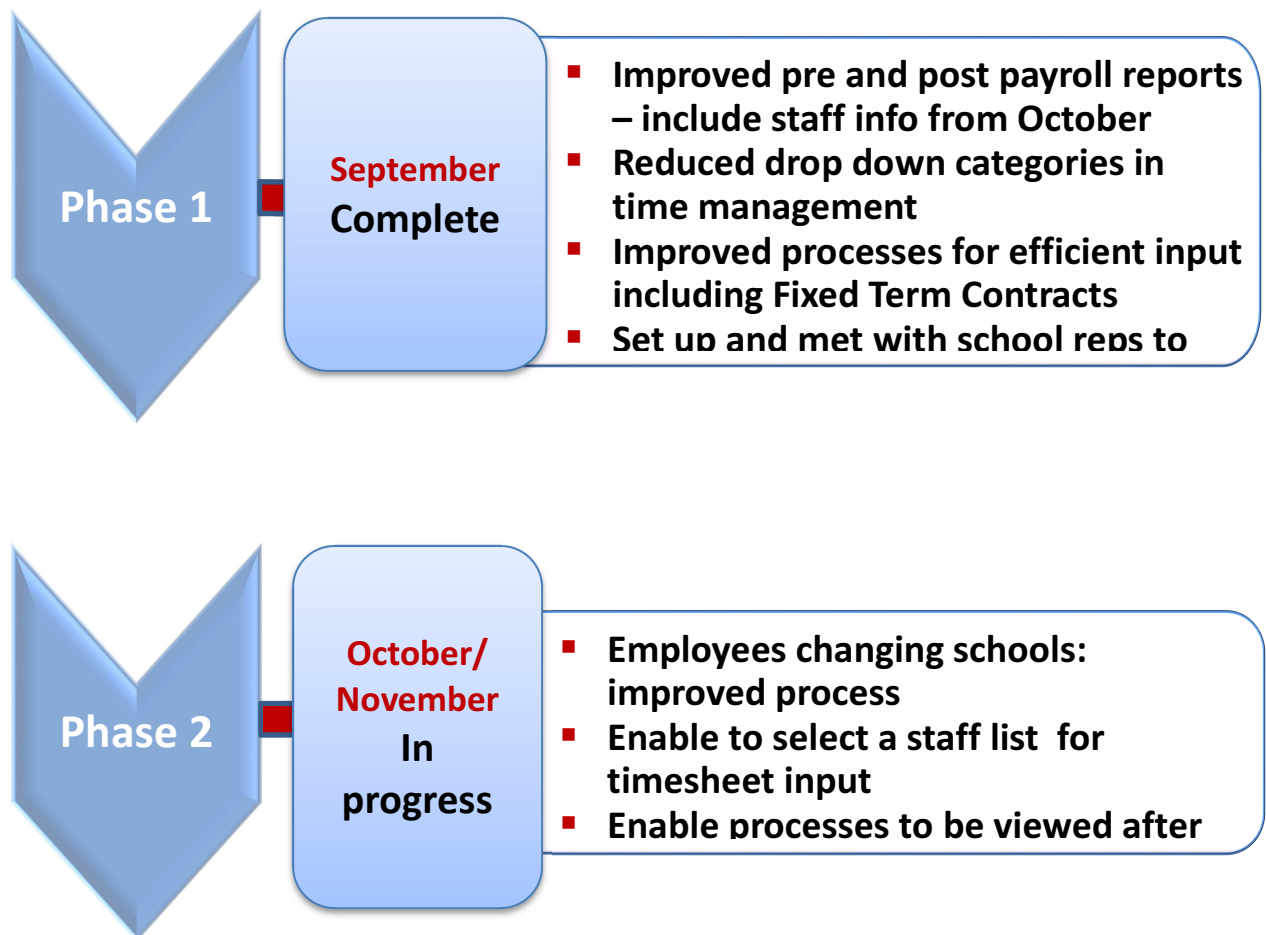
- CSGs Schools Business Manager, Kim Garrood – to attend forums, and increase visibility

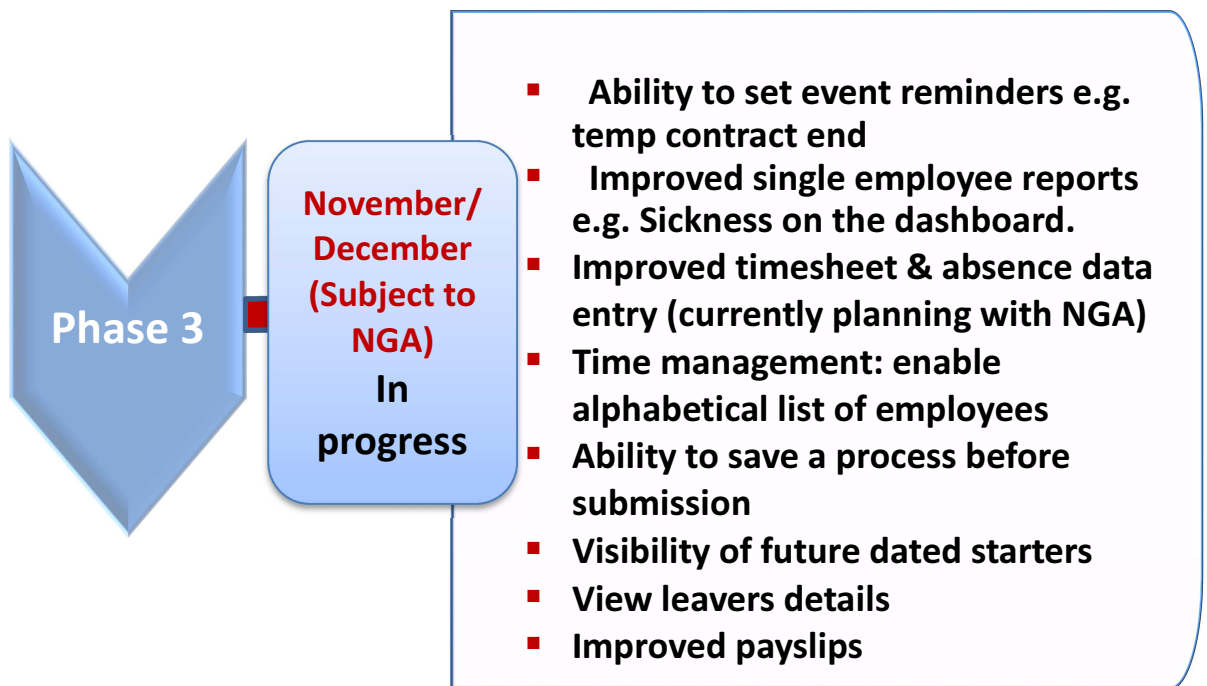
6. Progress to date

Since September CSG has undertaken a number of activities as follows:-

6.1 System Developments

Since the committee meeting in July there has been a number of system developments introduced, as well as progress made to towards further improvements. The implementation of the system improvements have been phased in 3 releases as follows:-





NorthgateArinso (NGA), are the payroll software provider, who CSG are working with to develop improvements to their MyView system. As such, there is a dependency upon NGA to deliver these within the timescales requested. The implementation dates for the developments in Phases 2 and 3 above are therefore provisional, pending confirmation from NGA. Any changes in delivery dates will be communicated to the schools.

Whilst system developments have been in progress, CSG has been mindful of feedback from schools regarding the time it is taking them to process transactions on line. As an interim, schools have been given the option to submit forms to the payroll service in Carlisle notifying them of required changes, and for the Carlisle team to input these on their behalf. For information there has been a very low take up of this, and schools are still using the system to process transactions.

A number of schools who advised of the slow speed of the system have been asked to provide specific feedback so this can be reviewed by NGA.

6.2. Schools Engagement

A forum of School Business Managers, representative of a cross section of Barnet schools has been formed. There are 11 schools represented, as well as members of the schools finance service. The first meeting was held on the 24th September 2014. This proved extremely helpful in obtaining feedback from system users, and provided an opportunity to discuss and review planned developments.

The next session is planned for the 13th November 2014 and will also be attended by the Technology Product Manager, and Managing Director, for Capita HR Solutions who wish to receive feedback direct from users of the HR & Payroll systems which will help inform future developments.

In addition, CSG are keen to increase the level of face to face engagement with key stakeholders within schools. Representatives from the HR & Payroll Service, and the Schools Services Manager attended a meeting of School Business Managers on the 21st October 2014 to discuss system developments and respond to queries for the managers. CSG welcome the opportunity to engage with schools in these forums and are exploring further opportunities to attend other networking sessions with school representatives.

6.3. Communications with Schools

CSG recognise the importance of ensuring schools are aware of the actions in progress to improve the functionality of the systems, and as such issued its 2nd edition of the "Service Development Newsletter" in September 2014, with the 3rd one planned for issue in November 2014.

All system users were provided with a User Guide and an opportunity to attend training sessions in March/April 2014 as part of the system implementation. It is intended that as the system developments are implemented these guides will be updated to reflect changes in the systems, and support will be offered to system users to ensure they are aware of any changes in the processes.

In addition the HR & Payroll Termly Newsletter was issued to schools in September 2014. This is delivered as part of the traded services, and provides schools with information and advice on all HR and payroll aspects within the Education sector, as well as advertising training events.

6.4 Schools Feedback so Far

Feedback to date from schools representatives is that they welcome the improvements advised, as their frustrations are with the systems, particularly the time it takes to process transactions; and the fact that the processes within the system are "clunky".

There has been positive feedback in the meeting on the 24th September and the 21st October on the developments planned. In particular the schools have welcomed the report providing staffing information. This will be available for schools for the October payroll. A number of schools have also provided positive feedback on the customer service provided by the delivery team in Carlisle.

We recognise that a number of schools are reviewing the provision of services for 2015/6, and experiences to date may influence their decision on who to

purchase services from. We are very keen for schools to be able to experience the improvements planned for MyView so that they can make informed decisions.

7. Conclusion

- 7.1 There were a number of issues occurred during the early months of the new service, some of which could have been managed better had there been longer timescales for engaging with schools, and refining the system functionality to improve school user experience and timescales for processing transactions.
- 7.2 There is a rigorous programme of system developments in place, a number of which have been implemented, and others due for implementation in the next three months.
- 7.3 The increased engagement with schools, in particular through the payroll forum will support the identification of further system enhancements for 2015.
- 7.4 CSG apologises for the issues that Schools have experienced during these challenging months but hopes that the committee accepts that it is taking appropriate action and has acted promptly to address the issues since the last committee.
- 7.5 CSG, and specifically Capita HR Solutions are committed to improving the system functionality and thereby the experience for school users.