LONDON BOROUGH OF CROYDON

REPORT:		**EXECUTIVE MAYOR DECISION**
DATE OF DECISION		**18th June 2024**
REPORT TITLE:		**Oracle Improvement Programme– HR Business Case**
CORPORATE DIRECTOR:		**Jane West, Corporate Director of Resources (S151 Officer)**
LEAD OFFICER:		**Jane West, Corporate Director of Resources (S151 Officer)** **Jane.west@croydon.gov.uk**
LEAD MEMBER:		**Cllr Jason Cummings, Cabinet Member for Finance**
KEY DECISION?	**Yes**	0224F **Reason:** Key Decision – Decision incurs expenditure, or makes savings, of more than £1,000,000 or such smaller sum which the decision-taker considers is significant having regard to the Council's budget for the service or function to which the decision relates
CONTAINS EXEMPT INFORMATION	**NO**	Public **Grounds for the exemption: N/A**
WARDS AFFECTED:		**All**

1   SUMMARY OF REPORT

1.1   Following the report taken to 27 March 2024 Cabinet, officers agreed to come back in June with the human resources and organisational development (HR & OD) module. This report seeks approval to the Oracle Improvement Programme business case, regarding the elements within HR & OD including establishment management. This will initiate a two-year programme of work to ensure the council makes the most of its investment in the Oracle platform and drive improvement to key business processes.

1.2   The improvement programme which this investment supports is required to enable the transformation ambitions of the Council – including the technology and artificial intelligence solutions – to support the priorities in the Mayor's Business Plan 2022-2026 as detailed below.

2 RECOMMENDATIONS

For the reasons set out in the report, the Executive Mayor is recommended to approve the recommendations below to:

2.1 Approve the Oracle Improvement Programme HR business Case attached as appendix A.

2.2 Approve the addition to the capital programme of the budget requested of £3.322m funded through earmarked reserves.

3 REASONS FOR RECOMMENDATIONS

3.1 To provide the Council with the confidence that it has a robust Oracle platform for HR and Payroll systems that reflects best practice and enables further council transformation.

3.2 To improve the user experience of Oracle by promoting greater self-service functionality for employees and line managers and promote simplification of standard processes and maximise the opportunities for automation and use of artificial intelligence.

4 BACKGROUND AND DETAILS

4.1 The Oracle Enterprise Resource Planning (ERP) application (Oracle Cloud Fusion and referred to at Croydon as My Resources) is one of the most critical IT systems used across the council. It is a suite of inter-dependent modules that cover finance, HR, procurement, and supply chain operations. It enables the payment of staff and suppliers, the collection of income and management of the Council's finance and employees. It also allows the council to meet its statutory duties regarding the public sector equality duty regarding reporting on protected characteristics of its employees.

4.2 The council has a contract with Oracle for licenses to use their Fusion product and a separate contract with Mastek who implemented the system and provide ongoing support. Following approval, there will be further procurement and contractual arrangements undertaken to support the delivery of this programme, which will be separate from this decision.

4.3 Since 2019, with the implementation team disbanded after going live, little investment has been made to develop the system and its current configuration is holding back the wider transformation of the council.

4.4 As reported to Cabinet in September 2023 and March 2024, Oracle were commissioned to undertake a review of Croydon's system to understand where improvements can be made to align the system with Oracle best-practice and ensure the Council maximised the benefits it can achieve from its investment.

4.5 HR processes were assessed at stage 1 maturity (i.e. the lowest) and are characterised by many off-system activities and functionality gaps with consequent

heavy human-intensive effort. This prevents the HR and OD service from delivering the necessary people related interventions to support Croydon's transformation.

4.6   Oracle concluded that it should be realistic to aim for a best practice level of maturity and identified a range of interventions including quick wins and reporting and functionality already in place.

4.7   Cabinet in September 2023 agreed to a six-month programme of work to construct detailed improvement plans and a business case. To enable this, funding of £0.915m was agreed as an initial upfront investment to undertake this planning and put in place a core resource complement through to March 2024. The business case covering Finance and Procurement was considered by Cabinet in March 2024. This business case covers the remaining HR and payroll elements.

Business case

4.8   The principal objective of the Oracle Improvement Programme is to provide the Council with confidence that it has a robust Oracle platform for finance, HR, payroll and procurement systems that reflect best practice and enable future council transformation. The business case sets out further objectives, an important one being that it should provide a single version of the truth for all council finance and HR data. Currently regarding HR data, this is not the case.

4.9   The following design principles have been developed to guide the improvement plan:

- Start with the Oracle recommended "best practice" processes and configuration.
- "Adopt not Adapt" this may mean changing our process to work with the system – don't bespoke the system to match our process.
- Move to "on system" processes where we can.
- The system should record sufficient detail to support processes.
- Data not to be stored outside of the system (e.g. on spreadsheets).
- Management and Business Information to be made available through dashboards.
- Avoid the need to re-key data.
- We need to be the most cost effective and efficient council in London.
- Increasing value from the investment in the system.
- Automate and use artificial intelligence where available to achieve the above.

In addition, the Oracle Improvement Programme will contribute to the Future Croydon Transformation Plan through optimising and automating a core system (Oracle) and redesigning business processes to be among the best in class for efficiency.

HR Business Case

4.10   The HR and OD business case has been informed by extensive consultation with other councils as well as workshops with Oracle and partners to assess functionality. This work aligns with the forthcoming HR redesign and delivery of the People Cultural and Transformation Strategy. The aim is to have a stable and reliable platform that can support people interventions across the employee life cycle.

4.11   The key proposed deliverables are:

Establishment management – giving managers the ability to see all their people resources, linking with available budgets and with the necessary compliance and audit trail to identify changes on the platform.

Core HR – giving employees and managers greater control over their data by allowing self-service to reduce duplication of effort and better manage the starters, movers, and leavers process. Using the standard Oracle Redwood interface, it will be more intuitive and accessible allowing self-service on a range of everyday tasks.

Oracle Recruiting Cloud – a significantly enhanced candidate experience that is both accessible and intuitive. This will also support hiring managers and the recruitment team with a reduction in the number of administrative tasks to undertake and focus on securing the right candidates for roles in Croydon. It will also support the wider take-up and use of Oracle as it will be the primary driver for both internal and external candidates.

Oracle Time and Labour – enhanced manager and employee self-service to reduce pay errors and adjustments by the accurate application of pay rules and policies within the system.

Talent Management and Learn – replacing standalone solutions to ensure Croydon has a single platform for appraisals, learning and development of its workforce.

HR Helpdesk – replacing emails and off-system processes to provide Croydon with a simple front door for common queries and managing informal and formal employee relations casework in a secure way.

Each of these modules comes with enhanced reporting and audit capabilities and built-in features to enable completion of tasks and guided learning to support employees and managers to undertake the tasks they need to do as part of their roles.

Change Management

4.12   The Oracle improvement programme system improvements will only be successful if the business process improvements enabled by the programme are embedded into the business. A dedicated change manager will ensure this happens.

4.13   The business case sets out the approach we will be taking to change management. There will be training, communication and engagement, along with a focus on embedding change in the longer term by developing key metrics, pathways and escalation routes for addressing behaviour where organisational procedures are not being followed.

4.14   Oracle Cloud Fusion is a product under constant development with quarterly upgrades. Major changes are expected to improve the product during this period of implementation. Therefore, there will be strong focus on building a continuous improvement culture, providing the training and development to enable colleagues within the HR and OD function and employees to identify opportunities for improvement in the day-to-day processes and building the resource to enable the organisation to support the delivery of this activity.

4.15 Change activity will be undertaken at both a workstream and programme level.

4.16 To address the known issues at Croydon such as change fatigue, a lack of engagement and issues with compliance around new processes / procedures, the change activity for the programme has been split into three parts:

- Oracle Improvement Programme change activity
- Metrics and KPI Activity
- Continuous Improvement Activity

Programme Management

4.17 Given the importance of these changes to the Council and the pace of change required appropriate programme management and leadership capacity to deliver the objectives have been built into the business case. The budget proposed includes temporary extra capacity across HR functions to support the delivery of the enhancements to the modules in addition to their business-as-usual activities. The preference will be to source this from existing staff and backfill their roles to build resilience and expertise of the technical aspects of the solution. The future HR redesign will need to factor in the requirement for ongoing support to these modules.

Financial Cost

4.18 The cost for the HR workstream is £3.3m and set out in the table below. It is the extra programme budget requested.

	2024-25 £'000	2025-26 £'000	2026/27 £'000	Total £'000
Total	**1,742**	**1,580**	**0**	**3,322**

Benefits

4.19 The business case is designed to provide the Council with the confidence it has a robust and sustainable Oracle platform for HR processes that reflect best practice, optimises business efficiency and enables the Council's transformation ambitions. The improvements will ensure key data is held on the system, producing a single version of the truth, strengthening data retention, data security and improving audit trails. Specific modules such as Oracle Recruiting Cloud will drive further take up of the solution not just for HR but across all modules due to the benefits of a similar interface across HR, procurement and finance.

4.20 The business case goes into detail on the expected benefits for the HR and OD workstream. The features include:

- Greater control for employees and managers for everyday tasks, combined with automation and the potential for generative artificial intelligence to support routine tasks.
- Improved candidate experience to attract and retain workers.
- Improved people data to provide better workforce insights

Cashable benefits

4.21   The improvements set out in the business case will be key enablers of future cashable efficiency savings for the Council and the programme investment is expected to be paid back over three years. The current Medium Term Financial Strategy and existing Transformation Plan have provision for cashable savings relating to the transformation of the HR, Finance and Procurement functions which will rely on major improvements to the Oracle platform.

4.22   The improvement programme should be seen as the starting point for fully exploiting the capabilities of the platform. At the completion of the improvement programme, arrangements will need to ensure the council continues to embed the continuous improvement within its business-as-usual activities.

Milestones

4.23   The improvement is planned as an 18-month programme of work. The work is identified within phases. While completion of new modules will take some time, it is expected that regular improvements can be delivered which will form the building blocks for the enhanced overall offer.

4.24   The work is proposed to be delivered in three phases highlighted as phase 1 (blue) – establishing the building blocks through enhancements, phase 2 (yellow) – leveraging the capabilities of the system through a new talent and recruitment module and phase 3 (green) – optimising the solution using automation, more self-service and AI.

	May 24	Jun 24	Jul 24	Aug 24	Sep 24	Oct 24	Nov 24	Dec 24	Jan 25	Feb 25	Mar 25	Apr 25	May 25	Jun 25	Jul 25	Aug 25	Sep 25	Oct 25	Nov 25	Dec 25
Establishment Management	░	░	▓	▓	▓	▓	▓	▓	░	░										
Core HR			▓	▓	▓	▓	▓	▓	▤	▤	▤	▤	▤	▤						
Payroll			▓	▓	▓	▓	▓	▓												
Learn									▤	▤	▤	▤	▤	▤						
Oracle Recruiting Cloud									▤	▤	▤	▤	▤	▤						
Talent Management									▤	▤	▤	▤	▤	▤						
Oracle Time and Labour (OTL)															▥	▥	▥	▥	▥	▥
HR Helpdesk															▥	▥	▥	▥	▥	▥
Digital Assistant															▥	▥	▥	▥	▥	▥

Risk

4.25   The business case sets out several risks for the programme to manage, in addition to those set out in the March Finance and Procurement business case. The main risks include:

- Competing demands across the organisation both within the HR and OD service and key stakeholders to support the implementation.
- Ensuring sufficient capacity within the HR and OD and systems support teams to ensure the benefits arising from quarterly upgrades are sustained.

Commercial considerations

Mastek support

4.26   Mastek as our support partner are required to continue with the current support arrangements for a further two years from the current contract expiry in August 2024 and be engaged to deliver the technical solutions set out in the Finance and Procurement plans and when ready the HR improvement plans. The appropriate procurement processes via a compliant framework are being pursued.

Oracle License

4.27   The council currently spends c£500,000 pa on its Oracle license. This is of a similar level to other London Boroughs that use Oracle Cloud. The license period is up for renewal in September 2024 with the price base currently fixed at 2017 prices. The license covers many modules of the software and the extent of their use and cost is largely driven by active user numbers and is part of the consideration of the project. There are potentially modules we are not currently making use of that we may wish to use more expansively and similarly there may be modules we conclude are not required or we can re-engineer the extent of the volume needed.

5 ALTERNATIVE OPTIONS CONSIDERED

5.1   Continuing to leverage the Oracle Fusion platform is considered to be preferable to undertaking a costly retendering exercise to replace it and implement an alternative system.

5.2   Also considered was operating with no further investment in Oracle Cloud and to work within the constraints of the current system footprint. This was considered as suboptimal as it would hinder further service improvements and is impractical given the Oracle Cloud system is constantly evolving and will always require development.

6 CONSULTATION

6.1 Engagement has been undertaken with HR and Payroll, Finance and Procurement business owners both separately and through several workshops facilitated by Oracle. The workshops were well-attended with more than 70 users from inside the council attending 12 workshops, culminating in more than 20 hours of discussion. Following on from this and during the during the development of the business case proposal there has been ongoing consultation with business owners. The proposals presented in this report have the support of the business owners.

6.2 This level of consultation and engagement has meant that there is a comprehensive view of the requirements and ambitions of Croydon to not only improve business processes but also adopt improved cultures and behaviours.

7. CONTRIBUTION TO EXECUTIVE MAYOR'S BUSINESS PLAN

7.1 This programme of work directly contributes to the following outcome and supporting priorities in the Mayor's Business Plan 2022-2026:

Outcome 1 – The council balances its books, listens to residents, and delivers good sustainable services.

Priority: Get a grip on the finances and make the Council financially sustainable.

Priority: Ensure good governance is embedded and adopt best practice.

Priority: Develop our workforce to deliver in a manner that respects the diversity of our communities.

8. IMPLICATIONS

8.1   FINANCIAL IMPLICATIONS

8.1.1 This is an important element of the project to enhance our key corporate Finance, Procurement and HR systems which we are not currently making the best use of. The business case for Finance and Procurement improvements was approved in March. The cost of the HR business case is set out in paragraph 4.1 and is forecast to be an extra cost of £3.322m in addition to the cost of the Finance and Procurement business case. This is in line with the guidance given in March.

8.1.2 The £3.322m budget is requested through this report to be added into the capital programme and will be funded from earmarked reserves. Commercial discussions are taking place with Oracle over the annual revenue licencing costs, if these lead to an increase or reduction then these need to be taken into account in the Council's Medium Term Financial Strategy (MTFS).

8.1.3 Comments approved by Lesley Shields, Head of Finance for Assistant Chief Executive and Resources on behalf of the Director of Finance. 04/06/2024

8.2 LEGAL IMPLICATIONS

8.2.1 The approvals sought in this report will not in or of themselves incur expenditure but will give rise to expenditure in the subsequent stages of the decision-making process. The procurement activities were set out in the finance and business case considered at the Cabinet meeting of 27 March 2024. All procurement and contract related decisions occasioned by the approvals will be made in accordance with the Executive Mayor's Scheme of Delegation, the Tenders and Contracts Regulations and the Public Contracts Regulations 2015.

8.2.2 More generally, all spending decisions must be capable of demonstrating value for money, financial prudence and be in the best interests of tax payers.

8.2.3 The Council's budget and policy framework procedure rules (Part 4C of the Constitution) provides that in general the Executive may only take decisions which are in line with the Budget and Policy Framework and the budgetary allocation is set out in the financial implications section above. In accordance with the Council's Reserves Policy which was agreed by Full Council as part of the budget setting process, the use of General Fund reserves have to be agreed by the Corporate Director of Resources (s151 Officer).

8.2.4 In respect of projects which form part of the proposed programme, officers will be undertaking the necessary Data Protection Impact Assessments to support the Council's data protection duties, including in relation to ensuring privacy by design as part of the projects and their implementation. Under the UK GDPR and Part 3 (section 57) of the Data Protection Act 2018, the Council has a general obligation to implement appropriate technical and organisational measures to show that it has considered and integrated the principles of data protection into its processing activities.

8.2.5 Comments approved by the Deputy Monitoring Officer on behalf of the Director of Legal Services and Monitoring Officer. (Date 16/05/2024)

8.3 EQUALITIES IMPLICATIONS

8.3.1 The Council has a statutory duty, when exercising its functions, to comply with the provisions set out in Section 149 of the Equality Act 2010. The Council must, in the performance of its functions, have due regard to the need to:
- Eliminate discrimination, harassment, victimisation, and any other conduct that is prohibited by or under this Act.
- Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it
- Foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

8.3.2 The proposed improvements for the Oracle platform are expected to be positive given the shift to a more accessible and intuitive interface, and improved clarity on

sharing personal (including equalities) information. It will be important for the programme team to consider the implications for accessibility and equalities as the project progresses and keep this under review.

8.3.3 Comments approved by Ken Orlukwu, Senior Equalities Officer, on behalf of Helen Reeves, Head of Strategy & Policy on 13/05/2024.

OTHER IMPLICATIONS

8.4   HR IMPLICATIONS

8.4.1 The Oracle programme aligns with the HR Review and the People Cultural and Transformation Strategy. It is key to service transformation. Additional temporary capacity across HR functions has been identified to support the delivery in addition to business-as-usual activities.

8.4.2 There are no further HR Impacts not already identified in this report.

8.4.3 Approved by: Gillian Bevan, Head of HR Resources and ACE on behalf of the Chief People Officer. (Date 02/05/2024)

9.   APPENDICES

9.1   *Appendix A – Oracle Improvement Programme Business Case for Human Resources and Organisational Development.*

10.   BACKGROUND DOCUMENTS

10.1 None

Oracle Improvement Programme

Human Resources and Organisational Development Workstream Business Case

June 2024

1.Document Control

1.1 Approvals

Name	Position	Approved	Date
Dean Shoesmith	Chief People Officer		
Alan Layton	Project Sponsor		
Paul Golland	Interim Chief Digital Officer and Director of Resident Access		
Jane West	Corporate Director of Resources & S151 Officer		
Marie Snelling	Interim Assistant Chief Executive		

1.2 Change Record

Date	Author	Version	Change reference
19/02/2024	Barbara Giles	1.0	
22/03/2024	Paul Ewing	1.1	Consolidation of sections
01/04/2024	Paul Ewing	2	Refinement
01/05/2024	Paul Ewing	3	Review submission to DS

1.3 Document Consultees

Name	Position	Feedback received	Date
Marie Snelling	Interim Assistant Chief Executive		
Dean Shoesmith	Chief People Officer		
Tina Rekhi	Head of HR Systems and Payroll		
Deborah Calliste	Head of Human Resources – Adult Social Care		
Grace Addy	Head of Learning & Organisational Development		
Jennifer Sankar	Head of Human Resources – Housing & Sustainable Communities Regeneration & Economic Recovery		
Katie Wallace	Head of Recruitment	19/04/24	

Name	Position	Feedback received	Date
Gillian Bevan	Head of Human Resources – Resources & Assistant Chief Executive		
Nazeer Shaik	Oracle Application Support Manager		
Corinne Clay	Change Manager - Oracle Improvement Programme		
Ross Duguid	Procurement Systems Development Manager		
Adam Kendall	Finance Workstream Lead – Oracle Improvement Programme		
Jon Martin	Head of Strategic Systems		
Jason Martin	Independent Consultant		

1.4 Abbreviations

Abbreviation	Description
AI	Artificial Intelligence
EPM	Enterprise Performance Management
ERP	Enterprise Resource Planning
ESS	Employee Self Service
HCM	Human Capital Management
HR HD	HR Help Desk
KPI	Key Performance Indicator
MSS	Manager Self Service
OD	Organisation Design
ORC	Oracle Recruitment Cloud
ORMC	Oracle Risk Management Cloud
OTBI	Oracle Transactional Business Intelligence
OTL	Oracle Time & Labour
Redwood	Redwood interface for Oracle Employee and Manager Self Service
TOM	Target Operating Model

2.Contents

3. Strategic Case

3.1. Programme Aims and Objectives

3.1.1. Scope

The scope of this business case is to deliver the Human Resources and Organisational Development improvements to Oracle Cloud Fusion. It should be read in conjunction with the business case considered in March 2024 which covers the finance and procurement elements along with the overall programme aims and objectives. The programme begins a renewal of Croydon's continuous improvement journey with the Oracle system and the associated business processes.

3.1.2. Background

The Cabinet meeting on the 27 September 2023, approved the development of a detailed plan with workstreams, milestones and costs to implement improvements to the Council's Oracle system. The reason for this recommendation were:

- To provide the Council with confidence that it has a robust Oracle platform for Finance, HR, Payroll and Procurement systems that reflects best practice and enables further council transformation.
- To improve the user experience of Oracle by promoting greater self-service functionality for line managers, budget managers and promote simplification and exploit the automation of processes.

The creation of the programme was informed by a review undertaken by Oracle to understand where improvements can be made to align the system with best-practice and ensure the Council maximises the benefits it can achieve from its investment. Design Principles

The Finance & HR Systems Steering Group agreed the following design principles to guide the development of the improvement plan. The guiding design principles agreed at the steering group are as follows:

- 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.
- We need to be the most cost effective and efficient council in London.
- Increasing value from the investment in the system.

HR have also added the requirement to automate and use artificialintelligence where it can add value in streamlining common processes and compliance.

The benefits of adopting these guiding principles are that the HR and OD function can reduce the time and effort on administration, maximise the value from the data on a common platform and focus on delivering the people interventions necessary to transform the organisation.

Since the Finance and Procurement business case, the Council has adopted the Future Croydon Transformation Plan which provides a framework for change over the next five years to deliver the Executive Mayor's Business Plan and Medium-Term Financial Strategy. The Oracle Improvement Programme will contribute to this transformation through optimising and automating core systems and redesigning business processes to be among the best in class for efficiency.

3.2. Human Resources and Organisational Development

3.2.1. HR and OD redesign

The HR and OD team are undertaking a redesign to realign their service vision, purpose, and delivery to support the delivery of the Mayors Business Plan and the People Culture Transformation Strategy (PCTS). The PCTS outlines seven core pillars for priority service areas within HR and OD, these areas require enhanced digital and technological solutions to support the overall business requirements and the enhancements outlined in this paper from implementing the Oracle system.
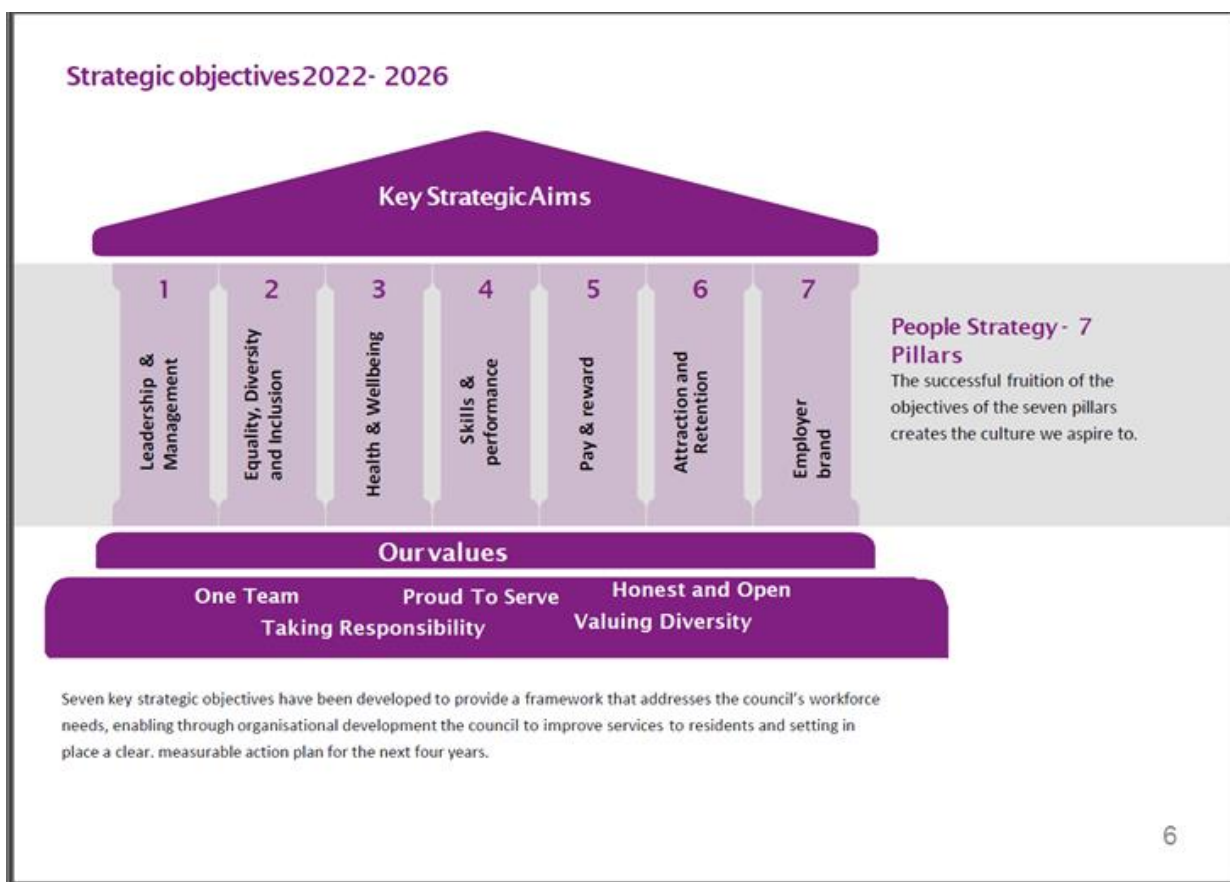
Figure 1 - Croydon Council's People Strategy 7 Pillars

In addition to the pillars, the strategy outlines the design principles that the service will follow in delivery. The McKinsey model focuses its service model on the 7S which are interconnected and mutually reinforcing. Changes in one area impact another. This will drive the approach to service redesign.
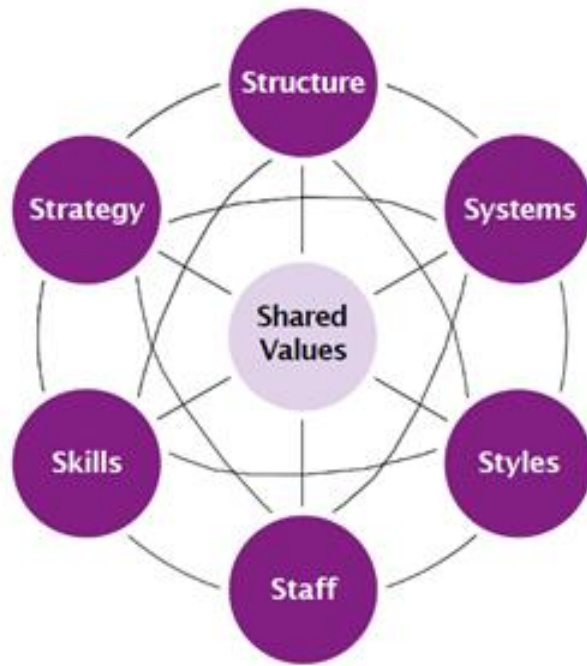
Figure 2 McKinsey Model 7-S Model

3.2.2. Change management.

Although the Oracle Improvement programme has the improvement to our Financial, Procurement and HR functionality at its core, this success will only be achieved if a broader approach is undertaken reviewing and making improvements across **people**, **process**, and **technology**.
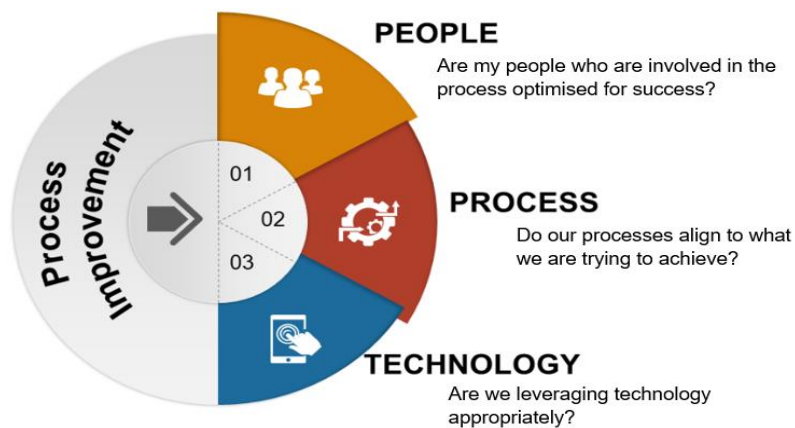

Figure 3 Process improvement approach.

There are specific change management requirements to implement and embed the technology. This includes:

People

- A full impact assessment to identify Business Change needs and support.
- Review, current vs required ream roles and responsibilities and develop options for a 'mini' HR Target Operating Model, including for quarterly upgrade cycle.
- A comprehensive training needs analysis based on Role Types and Processes, develop detailed plans, and implement (align to HR TOM)
- Tactical resource support by utilising Oracle Guided Learning, Training Guides, Training Sessions, Lunch and Learns and Training Videos

Process

- Review, baseline and map key identified processes, data flows, interfaces & control points.
- Ensure the necessary governance for security, access and control is in place to deliver employee and manager self-service.
- Ensure there are the necessary interfaces with third party systems to deliver the outcomes.

Technology

- Adopt not adapt ensuring we maximise the benefits of the Oracle platform.
- Have established procedures for reviewing quarterly upgrades and other enhancements, particularly where opportunities to automate and use AI become available.

3.3. Business Requirements and Outcomes

3.3.1. Business Requirements

HR and OD functions have evolved over recent years as it adapts and flexes to meet business needs and respond to changing approaches and requirements for service delivery. Whilst HR and OD will retain a strong people focus on the heart of their service offering, using digital technology, systems and processes are critical to enhancing the service offering. Modernisation and embracing change and the value that systems offer will enhance the service provision, allow managers, and staff more flexibility in managing their information.

HR and OD software has evolved to meet the demands of a digital world, and the cloud has been key to this transformation. A modern, cloud-based HR software solution helps us to adapt and evolve to the changing demands placed on the Council. Our current systems and processes are a mix of online and offline. These are sometimes inefficient and the further shift to utilising will improve out effectiveness.

The following capability are available which we need to ensure are exploited to maximise the value to the Council.

Advanced reporting and analytics	Gain a comprehensive view into our Financial & HR performance and better understand costs, and revenue by conducting historical trend and variance analyses.
Automation	Built-in workflows allow us to automate processes and significantly reduce the time taken to complete activities. Use of adaptive AI to support employee and manager self-service.

Work from anywhere	Cloud HR software allows users to access the application on any mobile device with an internet connection, from laptops to smartphones, enabling users to work securely from anywhere, anytime, on any device.
Quarterly update cycle	Oracle's software comes with automatic quarterly updates, enabling us to take advantage of increased automation and more features—every 90 days.
Compliance standards	Today's organisations need more than a digital version of spreadsheets. Beyond just recording transactions, cloud-based software helps HR teams maintain their policies by ensuring compliance.
Risk management	Cloud-based HR solutions include risk and compliance management, so companies can leverage these capabilities beyond audit trails and error checks to include the separation of duties and mapping of roles to responsibilities across the enterprise.
Artificial Intelligence	Oracle's software comes with a range of AI solutions if implemented correctly. The future Redwood Interface will build on these, and these can support HR, managers and employees complete tasks and reduce administrative burden.
Self Service	Employee and Manager Self Service reduces the amount of time taken to process common tasks through fewer handovers.

The HR modules are designed to underpin people related activities along the employee life cycle. How the technology supports the employee life cycle is indicated in the diagram below.
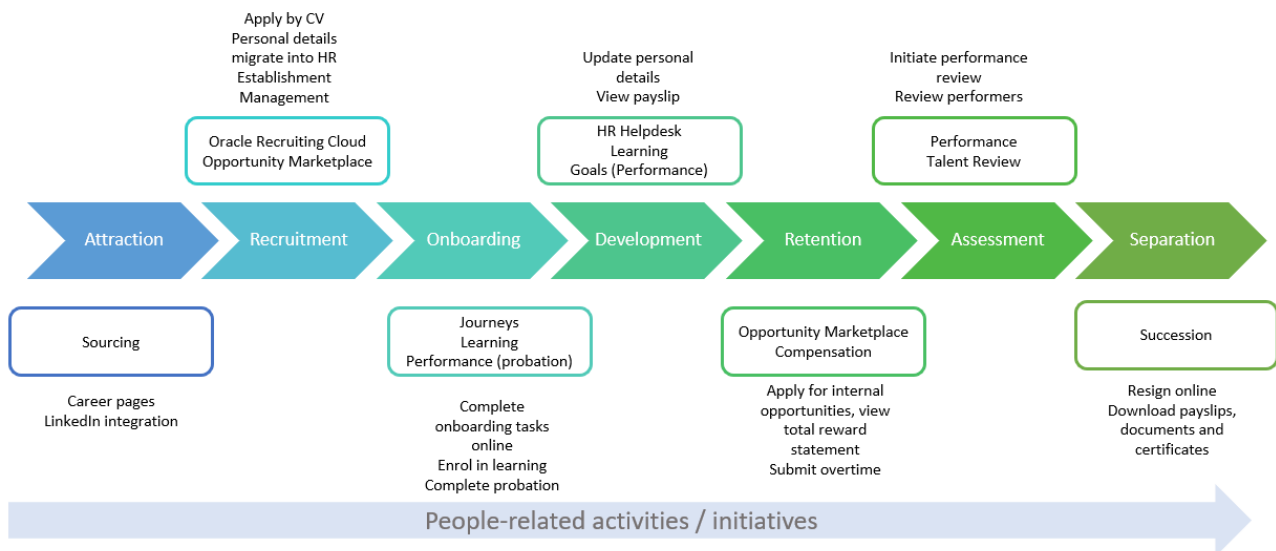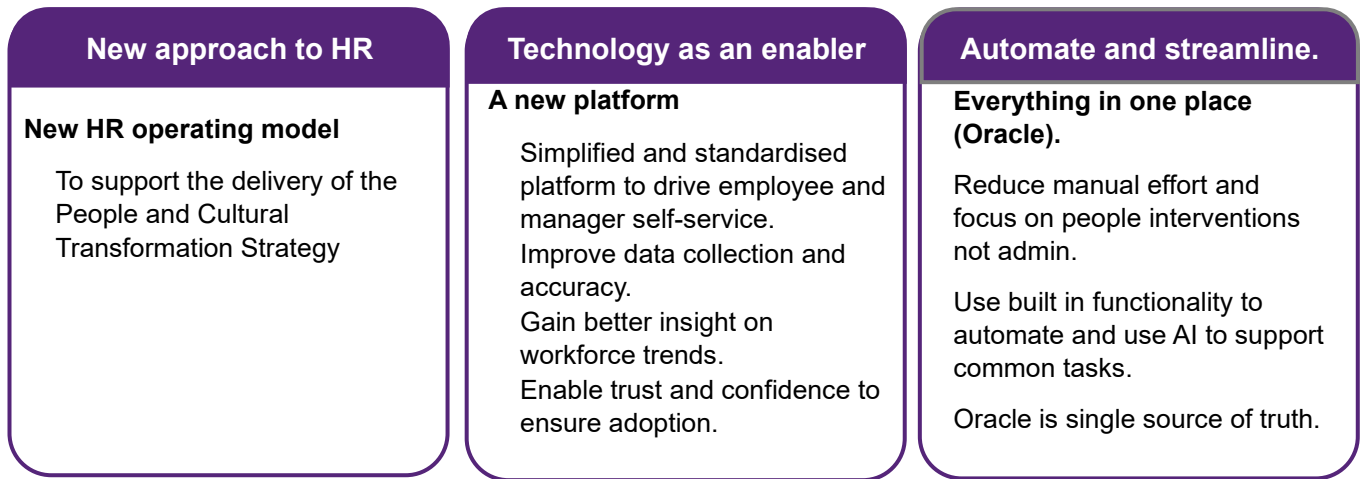

Figure 4 – The role of the proposed modules in supporting the employee life cycle.

The review of the current processes and systems has identified a considerable number of improvements which should be implemented to improve our HR and OD processes and systems. This section identifies the key improvements which are recommended to be implemented.

New approach to HR	Technology as an enabler	Automate and streamline.
New HR operating model To support the delivery of the People and Cultural Transformation Strategy	**A new platform** Simplified and standardised platform to drive employee and manager self-service. Improve data collection and accuracy. Gain better insight on workforce trends. Enable trust and confidence to ensure adoption.	**Everything in one place (Oracle).** Reduce manual effort and focus on people interventions not admin. Use built in functionality to automate and use AI to support common tasks. Oracle is single source of truth.

These priority areas are considered as a part of this business case; however, in the content of this document, we will be looking at the wider HR and OD alignment and its processes to ensure that we can maximise the benefits from this improvement programme.

3.3.2. Outcomes

The primary outcome of the programme is to deliver a technological platform that will support the people and process activities necessary to deliver the service for our residents. Within the modules in scope these are set out below.

Table 2: Oracle Improvement Programme HR & OD Priorities

Process	Current state	Outcome
Recruitment	• Current platform Taleo is complex and difficult to use, requiring manual interventions by recruitment team. • Poor candidate experience • Poor hiring manager experience. • Standalone HR hierarchy that requires updating	• Simplified and enhanced candidate experience allowing candidates to apply for roles using a CV and supporting statement that can be converted into an application form. • Reduction in complex manual offline workarounds to increase time and cost efficiency, reducing duplication of effort. • Integration of data between recruiting, Core-HR & Finance • Enhanced manager and candidate experience with necessary compliance and approvals built in
Establishment Management	• Manual process requiring completion of forms for various changes and additions. • Difficult for hiring managers to see positions. • Manager information not set at position level requiring manual updating by HR teams. • Lack of alignment between finance and HR structure • Agency workers not always on the organisation structure	• Empowering managers to control and manage their people resources through online processes. • Better visibility on position management creation, amendment and removal through workflow notifications and governance • In system Finance and HR alignment for Directorate, Department, Service, Team, and Cost Centres to facilitate budgeting and approvals and ease and accuracy for reporting.

Process	Current state	Outcome
	• Lack of reports for HR and Finance teams to quickly review and reconcile data	• Optimised Starters, Movers and Leavers processes supported within the Oracle system.
Updating personal information, skills, and qualifications, reporting on absence and leave	• Some employee and manager self-service but difficult to navigate due to local configurations. • Low completion rates on workforce information (such as ethnicity) • We currently do not capture certain workforce data such as skills and qualifications. • Requires significant administrative support	• Maximise the use of Employee and Manager self-service, removing previous local configurations to reduce the duplication of input and accuracy for position, contractual, absence and personal data requests. • Ability to self-service and report on a wider range of people metrics to inform workforce interventions. • Greater ability to run audit checks and reports. • Alignment with Starters, Movers, and Leavers process • Greater control in Access Management, Notifications and Approvals
Payroll recording	• Manual completion of timesheets • Difficult to report due to use of single field to capture a variety of payments	• Enhanced Manager and Employee Self Service • Reduced duplication of data entry • Reduce Pay Errors and adjustments by accurate application of pay rules and polices in System. • Reduction of Payroll preparation time • Increase compliance and ability to report on payroll. • Structure elements to fit the requirements and increase reporting capabilities. • Integration ability with Absence Management and Core-HR for reporting and self-service needs
Talent Management, Appraisals and Learning	• Talent management modules not used. Offline process • Appraisal process manually collated and reported on (returns only) • Learning delivered through separate provider	• One HR platform to manage Talent activities including learning and appraisals. • Improved Employee engagement • Improved strategic decision making on Talent and Retention for succession planning. • Improved reporting & analytics including on compliance with mandatory learning.
General queries and case management	• Various email addresses to contact teams. • Detailed intranet pages and HR Handbook • Casework managed offline with some limited reporting capability.	• Single point of contact for HR replacing various email addresses. • Roll out of HR Helpdesk for submitting, tracking and central point of traceability / volumetrics for HR Service Delivery Support • Secure case management solution for HR to manage and report on cases

3.4. Workstream summary

The discovery phase of the Oracle Improvement Programme considered the existing processes and technology relating to the Oracle system (commonly known at Croydon as "My Resources" and "My Finance").

In addition to discussions with Oracle and partners, extensive consultation with other councils has assessed functionality and leading practice.

The review identified a number of improvements which cover the following areas set out in the table below.

Table 1 – HR & OD Oracle Programme Delivery Scope

Area	In-Scope	Out of Scope
Recruitment (ORC)	✓	
Establishment Management	✓	
Core-HR	✓	
Time & Labour (OTL)	✓	
Payroll	✓	
Talent	✓	
Helpdesk and Case Management Solution	✓	
Oracle Guided Learning (OGL)	✓	
Reporting & Analytics (OTBI)	✓	
Absence Management (currently under implementation / BAU)		✓

The following areas are out of scope:

- Absence Management as this has already commenced and is in progress, however we will ensure alignment with Absence Management to ensure Core alignment and maximum efficiency and usability of the platform.
- Detailed requirements for the starters, movers, leavers process for the ICT service, however the aim with the core HR improvements is to establish the building blocks for any future development.

The detail behind these modules is set out below.

3.4.1. Establishment management

The Core-HR module is used by the council extensively, however there the are several areas where improvements have been identified around the effective management of positions within the organisational structure. This is known as **Position Management** and allows for the management of headcount and budgets with a complete picture of open and filled positions, which provides business benefits of aligning HR and Finance data.

The proposed improvements are set out in the table below.

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Workforce Structure:	New tools to request positions and changes to positions within the Oracle system. Removing the need for separate forms off system
Position Synchronisation	Simplify maintaining line managers by setting this at the position level to allow managers to identify their team and vacancies they need to fill
Advance Controls	Approvals built within the platform and finance and HR administrators have the necessary access to review and reconcile people structures and an audit trail for changes. This includes ensuring finance and HR are consistent on positions used moving forward.
Data Synchronisation	Establish protocols to ensure finance and HR data are reconciled and aligned monthly.
Agency	Ensuring all agency workers are set up on Oracle against a valid position.
Core Reporting & Analytics	Using the Core HR and Talent Management modules, the Council will be able to better plan and meet organisational changing requirements through effective use of data and resources within the tools. Position reporting will be essential to provide an interface for the managed service provider (Adecco) to reconcile positions and agency headcount and the provider has the platform to ensure this.

Employee & Manager Self Service	Simple tasks for employees and managers to take control and action including:
	   o Raise new position and position change requests.
	   o Raise assignment changes requests.

3.4.2. Core HR

Oracle's human resources platform provides intelligent tools that enable us to effectively plan, execute, manage, and optimise our critical people processes, empower HR leaders to personalise the employee experience, and facilitate better decision-making across the HR landscape.

The key features of Oracle Core HR are:

- **End-to-end HR –** Hire, onboard, manage and engage workers in accordance with legal and council practices ensuring connectivity and enhanced user experience.
- **On-demand Information –** Gives employees secure, self-service, mobile-responsive options to manage personal data, payslips and more. As other modules are enhanced or implemented, a unified approach to self service provides consistent and reliable information.
- **Workforce Modelling –** Leverage pre-built workforce modelling attributes to adapt existing workforce plans to current demand, determine the impact of workforce change on performance, and organise workers by their predicted risk of turnover.

- **Workforce Planning –** Leverage drag-and-drop tools and 'what-if' scenarios to understand critical workforce decisions, gain full visibility into concurrent planning objectives from other teams, and manage and visualize data from Microsoft Excel directly in Oracle HCM.
- **Benefits Administration –** Use self-service enrolment features to guide employees through the benefits enrolment process, calculate and monitor benefits plan rates for each employee group, and create flexible benefits plans to meet individual needs.
- **Work-life Solutions –** Improve work-life opportunities by providing personalised volunteer recommendations in My Volunteering, developing stronger brand influence and reach through My Brand, and creating activities to improve employee productivity in My Wellness.
- **HCM Reporting –** report on a variety of workforce reports and KPI driven dashboards to provide information to various management groups.
- **Intuitive and guided learning –** a new interface and features such as guided learning simplify and make accessible common tasks for end users so that they can be undertaken quickly.

In addition to the areas identified above regarding establishment management, there are additional benefits from adopting a range of enhancements to the current configuration. These are summarised below.

Improved employee experience	Enhanced management of personal data through employee self-service replacing the need for various documents of record. Migration of existing records from documents of record where feasible.
Improved manager experience	Manager self-service enhanced to enable requests for contractual changes, absence recording and establishment requests. Managers dashboard with reports assisting managers on contractual end dates, absences, and workforce planning.
Improved HR experience	Requests for changes to employee's contractual data all requested within the system by the manager, reducing duplication of input, reducing errors, and implementing set audit controls.
Improved reporting	Data available within the Oracle platform is available to those who need it using built in security features reducing the complexity of configuration. Built in reports to show common information such as headcount, turnover, sickness, and establishment.
Develop Individual Compensation Plans (ICP's)	Allowing Employees and Managers to request specific payments or deductions directly within the system following set rules and approvals, reducing outside system forms and email requests.
Develop production of Contracts	Consider the ability to generate contracts from within the system for movers (arising from acting up, secondments etc).
Use of digital assistant	Use of AI to support navigation and completion of common tasks.

3.4.3. Oracle Recruitment Cloud (ORC)

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To ensure we attract and retain the right calibre of candidates, Croydon Council wants to become more proactive in the Recruitment space. Using different social and application streams such as LinkedIn, enhancing its career site, simplifying its application process. Positioning the recruitment team move away from a traditional administrative supportive role to active 'Recruitment Consultants': sourcing and engaging with top tier talent. Identifying and categorising skill sets required for specific roles / resource specialisation.

- **Recruiting –** Leverage connections with external platforms like LinkedIn to attract target talent pools on personalised landing pages, improve hiring efficiency, consolidate, and review talent pools, and drive better employee retention over time.
- **Onboarding –** Deliver seamless onboarding experiences by managing all onboarding data in a unified platform, sharing new-hire tasks on a personalised to-do list, and driving productivity.

The council currently uses Taleo to underpin recruitment. At the time of implementation this was the product offered by Oracle, however this is no longer supported and there is a replacement solution, Oracle Recruitment Cloud that offers a number of benefits from migration. These are set out below.

Improved candidate experience	Candidates will be able to use their CVs to complete applications and supply a supporting statement on any device. This makes it easier to apply for roles. CVs are translated automatically into the candidate's application. They do not need to create a user profile to apply for jobs they only need an email address or their LinkedIn profile.
Improved hiring managers	Managers can select vacant positions to hire candidates and start the process within Oracle before needed support from HR. Hiring managers have dashboards where they can see their recruitment process and can review submissions online.
Simple tasks for onboarding	Selected candidates can be onboarded quickly and given a series of tasks to complete before starting using the journeys feature within Oracle. These simple checklists can be used by HR, hiring managers or the candidate.
Opportunities for internal candidates	Internal applicants can apply for roles and acting up opportunities through a dedicated internal jobs site. As they apply for roles, they build out their oracle details further with their skills and qualifications giving the organisation richer insights into its workforce
Single solution	Unlike Taleo, ORC works within the core HR module – reducing handoffs and putting all the information into core HR module – simplifying the process for HR and payroll. The candidate's information goes directly into Oracle without any duplication of effort.

3.4.4. Time & Labour and Payroll

The solution simplifies payroll processing and management, enabling users to accelerate employee payment and maintain compliance with payroll regulations.

The key features of Oracle's payroll software are:

- **Oracle Payroll –** Provides financial flexibility through any-time pay and retroactive pay options and enables us to process high volumes of payroll data quickly and accurately, minimising compliance risks through automatic payroll updates.

- **Oracle Payroll Core –** Offers access to automated features like multiple assignments and retroactive pay to streamline payroll processes, design payroll procedures based on requirements and business objectives, and reduce the amount of time spent on processing payroll.
- **Oracle Payroll Interface –** Delivers a single, integrated system to manage all critical HCM and payroll data, gain comprehensive insight into workforce trends and initiatives, and directly transfer effective dated transactions from Oracle HCM to the payroll system.

While the council uses Oracle for payroll there are a number of enhancements proposed to reduce the manual processing and duplication of effort. In addition, the council has manual processes for handing overtime and casual workers rather than the solution available within the system. The key enhancements are summarised below.

Removal of duplication	Employee enters variable data worked via the system and will flow to managers to approve and payroll team will validate the input and process through payroll. Removing paper / spreadsheet requests sent to a generic email account and being entered into the system manually by payroll team.
Improved manager experience	Manager will approve, reject, or request additional information for the variable data request on system or by email workflow. Removing the requirement to prepare the email and attach document to send to payroll email account.
Improved controls	System designed to log variable data requests per day, giving clear sight of when the work has been performed. Casuals being linked to Grades for hourly rate calculations reducing errors within hourly rates. System designed to have contractual rules built to prevent incorrect claiming. Approvals set within system following audit controls.
Elements review	Ensure elements are designed to enable more clarity of the element payment / deduction and assist on accurate reporting.
Improved Pensions Automatic Enrolment (PAE) Process	Implement the standard functionality within Fusion for the PAE process, ensuring the PAE regulations are met and requiring minimal manual intervention, reducing effort of input, and reducing risk of errors.
Improved payroll reports and implementation of payroll dashboard	Reports designed to assist payroll in identifying errors before the payroll processes have started, in a dashboard for visibility.
Occupational Absence schemes for TUPE Staff	Build the occupational absence schemes for TUPE terms and conditions of service, removing the requirement of manual calculation and risk of over / underpayments of salary.

3.4.5. Talent Management and Learn

Talent Management is the system or strategy used by an Organisations to effectively recruit, hire, develop and retain its employees. Croydon Council has an aging workforce with a substantial percentage of Employees due to retire in the next 10 years. There is a critical need to attract and develop a younger workforce and retain their skill sets along with developing existing staff into the roles Croydon will require in the future.

A strong technological platform will underpin this development. As part of the Talent Management strategy, we are looking to leverage the key modules and components that Oracle has to offer to enhance the talent lifecycle, improve decision making, identify high performing talent, train, develop career paths and identify progression routes to ensure Croydon retain such Talent for the long term.

The key features of the Oracle HCM Talent Management suite are:

- **Learning –** Provides one home for all learning which delivers personalised role-based learning recommendations. Reduces training gaps by tracking training and compliance with mandatory training.
- **Career Development –** Allows employee to build meaning development plans with goals, task, and outcomes. The employee will be recommended learning and role opportunities aligned to their interests.
- **Performance Management –** Embed generative AI functionality into performance management operations to create personalised action plans for each employee, facilitate collaboration on shared goals, improve goal setting and tracking, and drive value through unique workforce rewards.
- **Succession Planning –** Use intelligent visualisations and a dynamic dashboard to identify the best talent for open positions, create flexible talent pools to meet future business goals, and maximise the value of talent review processes across business units.

The council does not use these features within the Oracle environment and the aim is to deliver a solution that will simplify the way the council manages performance, develops talent, and provides development.

Appraisals	A platform to manage and review performance across the organisation. Employees initiate the process by reviewing their performance against agreed goals over the previous year and follow a simple series of steps to complete.
Learning	A platform to manage the councils online learning and monitor compliance with mandatory learning
Improved data captured for Qualifications and Certifications	Enhanced management of personal data through employee self-service. Enabling Employees to input their skills, qualifications and certifications which forms part of Core HR and Oracle Recruiting Cloud.
Seamless guided Employee onboarding experience	Co-ordinating hiring practices and overseeing the training of new hires to ensure they positively embedded and onboarded in the Organisation
Improved Manager Experience	Managers can identify their staff training needs, create, conduct, and evaluate employee performance goals. Gather and review ongoing or ad-hoc performance feedback, identify outstanding learning tasks, develop a collaborative approach with the Employee or team to define a development plan
Internal Mobility	Understanding the talent within the Organisation through the data availability captured in the system, recommending ideal roles to Employees, driving Career growth and retention
Personalised / Skills driven Learning	Identify and deliver personalised and role-based learning recommendations that are based on talent profiles and HCM Suite data
Career Development	Creation of Development plans with goals, tasks and target outcomes tied to roles of interest

Succession Planning	Implement intelligent visualisations and a dynamic dashboard to identify the best talent for open positions, create flexible talent pools to meet future business goals, and maximise the value of talent review processes across business units.

3.4.6. Reporting & Analytics

The system enables us to align workforce management initiatives with our business strategy, improve control over the entire workforce, and reduce compliance risks by connecting time, scheduling, and leave management with payroll and personnel data.

Across all the modules we expect to see a new set of reports and insights meeting the organisations requirements for on time people and information.

Establishment Reporting – Finance & HR Data	Single Source of Truth reporting with Finance and HR position synchronisation – enabling applied budget and funding tagging to each position and faster insights into the workforce structure and date effective headcount analysis
Organisation Structure Charts & Data	Visual charts will provide a dynamic view of the workforce, identifying approved established and filled position for Managers and Employees. Managers will be able to view their hierarchy structures, identify gaps or vacant positions using the position management report for targeted workforce planning.
Real-Time Reporting	Both employees and managers will be able to access and run ad-hoc specific reports on their dashboard view based on their access type and using the use of reports and data within the system.
Shared data and Insights	Connecting large sets of data from different Data Models allowing cross-functional analysis. Utilising HCM Extract enables powerful insights and actionable insights for Executives and Managers. Allows secure download and delivery options and the option to schedule direct to the user through bursting or triggering capability

3.4.7. HR Helpdesk

Currently there is no solution to support all HR queries or case management and the and through the implementation of HR Helpdesk we expect the following will be delivered.

Front door	A ticket-based solution for queries on HR matters, which combined with core HR elements and policy framework can provide AI-generated guidance, replacing the various emails and standalone forms and processes.
Digital Assistant	A digital assistant to support a range of HR queries and support employees and managers navigate and understand the tasks they need to complete
Case management	A secure end to end case management solution for informal and formal casework such as grievances, disciplinaries and sickness related matters.

3.5. Interdependencies

The realisation of the benefits which the potential enhancements could deliver is dependent on several factors and need to be managed effectively. The key dependencies and interdependencies are as follows:

3.5.1. HR Organisation Design

The HR and OD Redesign is dependent on the Oracle workstreams being developed and delivered in a timely manner as assumptions on the benefits and resourcing required to support the modules will be built to the design of the new HR and OD structure to move support the delivery of manager self-service and employee self-service. The Redesign will take in to account the timelines of a phased roll out and will be adopting the principles and process flows from within the Oracle platform. Roles will also need to reflect the requirement to support the technical platform and work within best practice for cloud-based solutions following "adopt not adapt" principle.

There will be a requirement to update guidance, and documentation available to staff and managers to ensure that the guidance notes are reflective of system changes and process changes. This is not presently mapped in the redesign programme, as timings will be dependent on the oracle roll out, however it is understood the importance of close collaboration with the Oracle programme.

3.5.2. Cost Centre Establishment Alignment

The technical solutions to deliver establishment management within the Oracle platform are only part of the solution. While the technical solutions within the Oracle platform will deliver a new position hierarchy within HR and provide robust compliance and audit tools, work on establishing protocols, standards and procedures between finance and HR teams is essential. This work has already started.

This will include incorporating Finance information into core HR data, establishing HCM Module, including Cost Centre Publication, Update of Interfaces / scheduling, Configuration of the Default Expense Account values (e.g. Cost Code, Channel, Segment Code, Department etc)

Ensuring a process to maintain and update a single tree for Finance & HR is underway and will be essential to maintain the structure moving forward.

3.5.3. Target Operating Model and organisational changes

This work will be undertaken while organisational and other structural changes are taking place. This could potentially impact the HR resources required to support the programme.

3.5.4. Oracle Quarterly Updates and Patching

As part of business as usual the service will need to continue to support the quarterly testing cycle that takes place in February, May, August, and November each year. As further modules are implemented the service will need to resource the ongoing support and implementation. Further details are set out in the change management section of this document.

3.5.5. Application support

There are several modules proposed to be deployed that will need to be supported through the application support team. The role will be to ensure the security, access, and stability of the overall platform. This includes the application of quarterly upgrades and patches and maintenance of testing

and development environments. While subject matter experts will be required within the HR function to undertake testing and advise on implementation of upgrades, the application support team has a critical role to ensure the ongoing stability of the programme.

3.5.6. Parallel Projects – Absence Module

Work on delivering the absence module for compliance with the council's statutory obligations is ongoing as a separate project but will support the underlying aims and objectives of this business case. This may include occupational absence schemes for TUPE staff. It is due to go live in August 2024.

3.5.7. Parallel projects – digital rollout

Employee self-service will only be possible if all workers have access to a digital device or have ability to access services easily on their own smartphones, computers, or tablets. The diverse nature of the workforce means that many workers currently do not have access to a computer or device. Without addressing this it will not be possible to remove existing workarounds such as paper-based forms etc.

3.6. Detailed dependencies and risks

Table 4: Oracle modules proposed and dependencies and risks with each.

Area	Dependencies	Risks	Mitigation
Recruitment (ORC)	- Position synchronisation (i.e. the setting of line management hierarchy at position level) - Establishment management project - Core HR including personal information, skills, and qualifications to be established. - Anonymised Recruitment Policy implemented. - Application of Archiving, Document retention standards & Access Policy	Change in procedures will require careful communication. Translating existing practice will not deliver desired solution or benefits. Manager led recruitment may be different from current practice.	Addressed through change management approach.
Establishment Control	- Interlinked HR & Finance Establishment Processes - Position Management - Position Hierarchy - Position Synchronisation - Cost Centre Management - Access Control - Delegation Functionality - Interfaces & Integrations	Procedures and protocols will need to be in place to embed changes. Without documented processes and procedures benefits may not be realised. Without defined access and controls delivery will be hindered Current MSP provider will need to engage.	Work underway with task and finish group.

Area	Dependencies	Risks	Mitigation
Core-HR	Starters, Movers & Leavers (Establishment): • Full Establishment (Perm & Interim) • Mapping of SML process • Impact Assessment & Process Changes • Org Charts – Position Hierarchy • Position Synchronisation • Interface / Integrations Position Management & Costing: • Change of Finance process for Cost Centre publication • Alignment of Finance & HR Trees • Configuration of Default Expense Account Access & Control • Define Access & Control Matrix - Published Areas of Responsibility & mapping of functional Privileges by Role Type • Auditing with / without ORMC Self Service: • Self Service – ESS & MSS functionality • Absence module implementation • Payroll enhancements	Without communication and engagement and necessary digital tools, employee and manager self-service may not be realised. Translating existing practices may not deliver desired benefits. Without defined access and controls delivery will be hindered	Addressed through the change management approach.
Time & Labour (OTL)	• All Employees have access to system via a mobile device. • Use of Project Codes • Timesheet Entries for Overtime • Holiday Pay Legislation (April 2024) • Exception Reporting	Without communication and engagement and necessary digital tools, employee and manager self-service may not be realised.	Addressed through the change management approach.
Payroll	• All enhancement designs from HCM modules – impact assessment on pay. • Review of elements • Exception Reporting	Translating existing practices may not deliver desired benefits.	Addressed through identified dependencies and programme.
Oracle Guided Learning (OGL)	• Establishment Access • Support post go live to maintain flow. • Analytics to identify Breaks & Flows of Journeys • Redwood interface adopted	Product better suited to end users than technical users.	Technical guides and solution design documents part of the work of the programme.
HR Helpdesk (HRHD)	• Full Establishment – Permanent and Interim positions / users need to be on Oracle to have access to submit tickets. • Data Reporting & Analytics	Correct access and retention standards essential for implementation.	Addressed through the identified dependencies.

Area	Dependencies	Risks	Mitigation
Reporting & Analytics (OTBI)	• Review of current reports and suitability for future use • Establish core data set to meet statutory and council requirements. • Dynamic Dashboard • Access and visibility For ESS & MSS Reports through role profiles • Technical training & knowledge transfer	Access for end users essential for the	
Talent Management	• All workers (employees, agency, external) have access to a learning platform including mandatory learning, which will require Oracle licenses. • Learning can be assigned by job function, • Reporting on mandatory learning assigned	A Learning Experience Platform is required to ensure the continued access to online learning with connectivity to the Talent Management modules to map development, training etc to maintain and manage talent management protocols within the council. Consideration for non-Croydon staff	

3.7. Business Change Summary

3.7.1. Business Change

The finance and procurement business case outlined the challenge regarding embedding change successfully in Croydon. The HR Workstream focuses not only on improving current practices around the existing HR modules but also the implementation of new functionality such as Oracle Recruitment Cloud, Oracle Time and Labour and Talent Management. There is also the additional complexity of additional transformation work being undertaken within the wider HR function which is being driven by the HR and OD and People and Change Strategies, all of which need to align with and be driven by the Oracle Improvement Programme.

Like many other Local Authorities, Croydon has undergone notable change over recent years, which has led to change fatigue and a lack of engagement from staff. Additionally, Croydon has undergone a period of high staff turnover particularly at Senior Levels and there has been a strong focus on Financial Management and Compliance in recent years due to the organisation's financial issues, both of which may have contributed to the lack of buy-in that currently exists. Often during times of intense change, employees feel as though change is being done to them instead of feeling that they are an important part of driving the change forward.

As with many other areas within the Council there are several offline processes that have developed in recent years which while requires considerable time and effort for staff. While this provides a workable current state for many functions, it means the council has less oversight on the ability to review, report or audit these activities.

Significant activity will be required to understand the drivers behind this offline working so that they can be rectified, and clear structured processes will need to be implemented to demonstrate the benefits of the change and embed the outcomes sought.

The Change element of the HR Workstream will be a significant and complex undertaking that will require dedicated resource within the current service. The focus will be not only on the large volume of activity involved in the Workstream itself but also fundamentally changing the approach and adoption of change going forward.

To determine the requirements for the first phase of activity the high-level change impact assessment has been completed. This information will be developed in more detail as the workstream progresses and will feed into future Communication, Engagement and Training Planning. Change readiness will be monitored through the council's workforce board.

Following implementation, the expectation will be for the HR and OD service to lead on both reporting and continuous improvement cycles. This will require the service to understand the technology platform in-line with the McKinsey 7-S Model mentioned earlier in the business case.
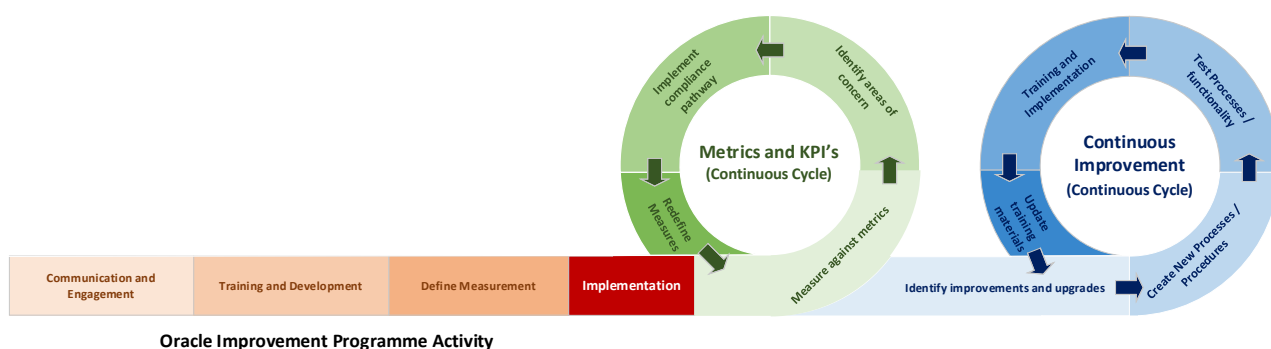

Figure 5 Oracle Improvement Process

3.7.2. Change Challenges

The following are examples of specific business change challenges for Croydon:

- Inaccurate establishment data due in part to off-system processes, lack of established protocols, current configuration of the system, dedicated reporting, and information
- Issues with the self-service processes due to confusing layout and interface, configuration that limits aspects of self service and off system processes.
- Change fatigue due to elevated levels of turnover, use of interims seeking short term solutions and poor engagement.
- Lack of ownership and understanding of roles and responsibilities. This is due to some processes not being clearly defined and the need to document and monitor ownership and compliance.
- Lack of awareness of the capabilities of the system due to key service users not understanding their role to develop subject matter expertise to ensure the platform supports current and future people interventions.

3.7.3. Change activities.

The following table shows some of the examples of business change activities that can be applied to some of the specific issues facing Croydon.

Table 5: Some of the potential change activities.

Challenge	What will we do?	How will we do it?	How will we track and monitor	What does good look like?	What does it mean?
Establishment control inaccurate data	Establish protocols for working between finance and HR and ensure feedback loops deliver changes	Develop a playbook for future working and train HR, Finance, and managers	Compliance with monthly returns Controls over approvals of new positions within the system with an audit trail	Accurate and aligned establishment data	The council knows the funding basis for its organisation structure and has controls in place to monitor this moving forward.
Self service	Improve the solution to make it more intuitive and accessible.	Implement Redwood interface. Put in place simpler processes	Increase in data on personal information. Reduction in the number of HR updates	People take control of their own personal information	The council has richer and accurate data on its workforce.
Change fatigue	Sell the benefits of the change to different cohorts of the workforce	Drop-in sessions (in person or virtual) Guided learning	Reduction in the number of off system or exception processes	Increase in employee and manager self service	HR and OD can focus on people practice not administration.
Lack of awareness of system capabilities	Ensure existing HR and OD teams are part of the solution design	Backfill roles where possible and offer additional resources	Ensure colleagues part of the role are responsible for knowledge transfer to their teams and deliver detailed implementation guides.	HR and OD teams become champions of where the solution can support their delivery of activities	Continuous improvement is embedded within the HR and OD teams

3.8. Programme Risks

Some of the specific risks for the HR and OD element of the programme are identified below. Mitigating these risks requires an approach that recognises the need for change, identifies and shows the organisation the benefits to users for the change and this is led by the Board, HR and finance professionals and leadership networks.

Description	Initial Score (likelihood x impact)	Mitigating Action	After Mitigation score (likelihood x impact)
There is a risk that there is a lack of engagement/capacity across the business to deliver the improvements identified, leading to benefits not being realised.	High	Early communication to stakeholders so this can be scheduled in.

Sufficient resources within the programme to ensure capacity to support delivery.

Delivery plan will be developed considering business priorities (e.g. Org Restructures). | Medium |
| There is a risk that there are insufficient resources within the programme to effectively manage the delivery of the benefits. | High | Manage programme to ensure key deliverables from each workstream are prioritised and staggered. | Medium |
| There is a risk that there is a lack of senior management buy in to the proposed changes, leading to poor compliance across the business. | Medium | Develop clear escalation process, communicate, and agree with Senior stakeholders.

Link between sustained change and return on investment reiterated at senior levels | Medium |
| There is a risk that the skills of line managers are not mature enough in all areas to enable effective self-service. | Medium | Line management training to be developed with the roll out of the new modules and functionality.

Simplified solution to reduce training requirements. | Low |
| There is a risk that ongoing benefits of the quarterly upgrades are realised due to insufficient capacity within the HR and OD teams and systems support team. | High | Quarterly updates opportunities will be reviewed and considered during the programme, scheduling in the deployment where there is a clear business benefit. | Medium |
| There is a risk that the changes proposed are not sufficiently ambition to deliver the required change. | High | External project capacity brough in to lead on the business case. Both Mastek and Oracle have been engaged to ensure that appropriate changes are realised. | Medium |
| Appropriate permanent staff can be released from BAU activities to undertake the SME roles during delivery | High | Details of requirements are being provided early to enable resource planning to be undertaken.

Resources identified to support the programme part of overall costs. | Medium |
| Use of self-service technology for employees not issued with laptops is addressed. | High | Ensure wider digital rollout programme factors groups that do not have laptops issued as part of their role and ensure there are ways for staff to access systems. | Medium |

3.9. Assumptions & Constraints

3.9.1. Assumptions:

The delivery approach has taken into consideration the following:

- Greater emphasis and need to deliver a targeted and supportive Business and Culture change at Croydon to uphold the technology improvements and wider business impacts.
- The need to make process changes to support working within the system to increase time and cost efficiencies.
- Resource Constraints – resource required internally and externally needed to deliver this programme to its maximum potential. Considering, key HR Lifecycle calendar dates and other key projects
- The need to move at pace to deliver the benefits from improved technology to underpin future people interventions and future operating models within HR and OD and the wider organisation.

- Project scope and timelines are clear and regularly communicated.

- Availability of internal resourcing

- Patches and critical updates will be communicated and reviewed in line with project deliveries to ensure both align and do not adversely impact the People, Processes, or the technology.

- Business alignment of programmes of work e.g. Methods, Transformation, HR, and OD Redesign

- Delivery of the digital rollout to enable employee self-service.
- Support team will be adequately resourced to support the new functionality and can manage new responsibilities around access and security.

3.9.2. Constraints:

- There is a constraint on the available internal resources to aid and support the project.
- There is a limit to the level of change an Organisation can absorb at any given time, therefore priorities will have to be re-assessed regularly.
- There are quarterly patches and updates that need to be made to maintain the current Oracle releases and testing required which will divert resources during this period. This includes the mandatory migration to the Redwood interface for employee and manager self-service by mid-2025.
- There is desire to implement key enhancements (e.g. establishment management) at pace.

4. Economic Case

4.1. Options Appraisal

As stated in the Finance and Procurement Business Case, Croydon Council embarked upon an Oracle Cloud implementation which can be regarded as a successful implementation. Therefore, we are focusing our resource on optimising what we already have and ensuring that the users use the solution as intended, as opposed to using local workarounds or spreadsheets. In September 2023, the Cabinet considered the options which included "do nothing", "change the platform", or "enhance what we already have".

Cabinet concluded that the Council should improve and extend their Oracle Cloud Platform and develop a detailed business case, which recognised the elevated level of business change required to meet the Council's future ambition.

The use of the support provider has been considered, alongside several other factors. This includes: the firsthand knowledge of the incumbent supplier, as well as the complex changes associated with payroll and absence management. The decision has been taken to continue with the Mastek, based upon the risks and likelihood of success.

4.2. Recommended Option

As agreed by Cabinet in September 2023, the Council is pursuing a detailed planning exercise around the improvements its needs to make to the Oracle Cloud Platform. The proposals in this business case present the recommended options coming from the detailed planning which is being undertaken.

5. Commercial Case

5.1. Commercial Summary

5.1.1. Summary

In October 2023, the Finance and HR Systems Steering Group considered and approved the following recommendations for a 10-year strategy to support the day to day running of the system and delivery of the Oracle Improvement Programme. The recommended procurement activities together with the rationale for the decisions were set out in the finance and procurement business case considered by Cabinet in March 2024.

6.Financial Case

The workstream costs for HR and additional programme management are set out in the table below.

The total cost of the HR business case is £2.67m. This cost reflects an acknowledgement of the need to embed and deliver the necessary organisational changes to ensure the benefits of the programme are realised.

The costs are broken down into:

- Costs of the implementation partner (Mastek)
- Technical implementation costs including the cost of business analysts to support the delivery and translation of requirements for the solution design documentation. This will include wider programme team support to support the longer implementation of the programme.
- Internal resource requirement costs to support the design of the solution and ensure it addresses existing and future process improvements and enhancements. This will be particularly important due to the level of organisational change taking place across the organisation, including within the HR service.

Workstream – HR and OD	2024-25 £'000	2025-26 £'000	Total £'000
Third-party implementation costs (Mastek)	565	300	865
Technical implementation costs (Project Resources)	659	689	1,348
Resource requirement costs (Internal)	518	590	1,109
Total	1,742	1,580	3,322

6.1.1. Breakdown of resources required

The breakdown of resources between project and internal is set out in the table below. Note that depending on the phase, resources may not be required full time.

The resource requirements are to support the notable change anticipated and support the wider transformation for the organisation. The programme is one technological enabler for wider organisation transformation and the resources have been identified to support this.

There are a mix of project and internal resources. Internal resources will be Subject Matter Experts (SMEs) validating Croydon requirements and become the change champions for the system. They will also be expected to maintain knowledge and expertise of the Oracle Modules for subsequent quarterly upgrade cycles to maximise the benefits of the platform.

The role of SMEs with the internal resources will be to:

- Participate in solution design development user acceptance testing and key user testing and business sign-off with Mastek and test solutions built to validate process.

- Learn the new modules and be able to support training for their teams and knowledge transfer.
- Identify changes in local processes or practice required to align with Oracle system and principles to "adopt not adapt."
- Become the change advocate within the business and with stakeholders.
- Identify training or other guidance (including Oracle Guided Learning) to support implementation.

Roles	Key Responsibilities	Phase 1	Phase 2	Phase 3
Project Resources				
Oracle HR Workstream Lead	Responsible for coordinating overall HR improvement programme and ensuring the programme remains on track and delivers the benefits outlined in the business case.	X	X	X
Interim Payroll / HR Consultant	Consultant to advise on end-to-end HR processes and ensure the stability of the payroll module.	X	X	X
Project Support	Support the programme team by ongoing risk assessments and mitigation across all workstreams, capturing actions and minutes at governance board meetings. Provide management reporting support including status of milestones and deliverables.	X	X	X
HR Business Analyst 01	Lead business analyst responsible for translating requirements into solution design for the end-to-end HR processes including establishment management, core HR and recruitment. Responsible for optimising the relationships between new and enhanced modules.	X	X	X

Roles	Key Responsibilities	Phase 1	Phase 2	Phase 3
HR Business Analyst 02	Business analyst responsible for translating requirements into solution design for payroll, time, and labour. Primarily required in phase 1 with some work for phase 3 and ensuring business readiness.	X		X
HR Business Analyst 03	Business analyst responsible for translating requirements for reporting into solution design. Required to work across all phases of the project and across all modules to ensure reporting requirements are delivered.	X	X	X
HR Change Lead	Dedicated HR change support across the phases of the projects including embedding change within the organisation and ensuring business readiness to enable wider transformation.	X	X	X
Internal Resources				
Oracle HR Senior Responsible Owner	Owner of the programme, a vocal and visible champion who defines and drives the programme's vision and target outcomes.	X	X	X
Oracle Application Team	Additional support for delivery of modules including access and profiles, specifically for HR configuration and establishing procedures for future business as usual activities.	X	X	X
CDS Role	Role to link to wider architectural support including starters, movers leavers and system integrations or interfaces.	X	X	X
Payroll Subject Matter Expert (SME)	Defining payroll requirements. See above for SME role.	X	X	X

Roles	Key Responsibilities	Phase 1	Phase 2	Phase 3
Talent SME	Talent and Learning requirements. See above for SME role	X	X	
Establishment Control & Information Officer SME	Establishment Management requirements. See above for SME role.	X	X	X
HR Data Analyst SME	Data requirements. See above for SME role.	X	X	X
Recruitment Resourcing Executive SME	Recruitment requirements. See above for SME role.	X	X	
HR Business Partner SME	Establishment Management, Core HR, Recruitment and HR Helpdesk (case management) requirements. See above for SME role.	X	X	X
HR Advisor SME	Core HR, Recruitment, HR Helpdesk (case management) requirements. See above for SME role.	X	X	X
HR SME	HR Helpdesk (front door) requirements for first point of contact.			X

7.Management Case

7.1. Programme and Project Management Arrangements

7.1.1. Programme Governance

The Finance and Procurement Business case outlined the programme governance arrangements which include a Finance and HR Systems Sterring Group which acts as a programme governance board.

7.2. Change Management Arrangements

Whilst the Programme focuses heavily on technological improvement to ensure the Council makes better use of its Core Systems, there is a recognition that Change Management, particularly for the HR modules, will be essential to drive and deliver these improvements. This is covered elsewhere in the business case, but this section is to reiterate there will be a strong focus on building a continuous improvement culture within the organisation.

Change Activity will be undertaken at both a workstream and Programme level to ensure that we not only focus on activity that will deliver the workstream outcomes but also to ensure that we identify cross cutting activity and work with end-to-end processes that impact multiple workstreams. As with any Organisation that has undertaken a large volume of improvement activity over recent years Croydon has experienced change fatigue, a lack of engagement and issues with compliance around new processes / procedures. To address some of these issues the change activity for the programme has been split into three main parts:

- Oracle Improvement Programme Change Activity
- Metrics and KPI Activity
- Continuous Improvement Activities

These are covered in the Finance and Procurement Business Case.

7.3. Benefits Realisation

7.3.1. Cashable Benefits

While not immediately able to deliver a payback on the investment being made, the improvements set out in the business case will be key enablers of future cashable efficiency savings for the Council and directly support the Mayoral business plan priorities:

- Priority: Get a grip on the finances and make the Council financially sustainable.
- Priority: Ensure good governance is embedded and adopt best practice.

The significant savings ambitions implied by the council changing its operating model set out in the updated Transformation Strategy will rely on the major changes proposed in this business case.

There are in the current Medium Term Financial Strategy and existing Transformation Plan evidence of a return from this investment, through cashable savings relating to the transformation of the HR, functions which will rely on major improvements to the Oracle platform.

The HR service will also be able to realise some cashable benefits by rationalising the technology used to deliver the service.

7.3.2. HR and OD workstream benefits

It is important that the key benefits and success measures are clearly defined to ensure that post implementation, we can understand if the expected benefits have been achieved.

The baseline data will be obtained prior to commencing the recommended improvements in this business case.

The key benefits of delivering the initiatives identified to be included in the HR & OD improvement programme are set out below across a range of HR practices and interventions.
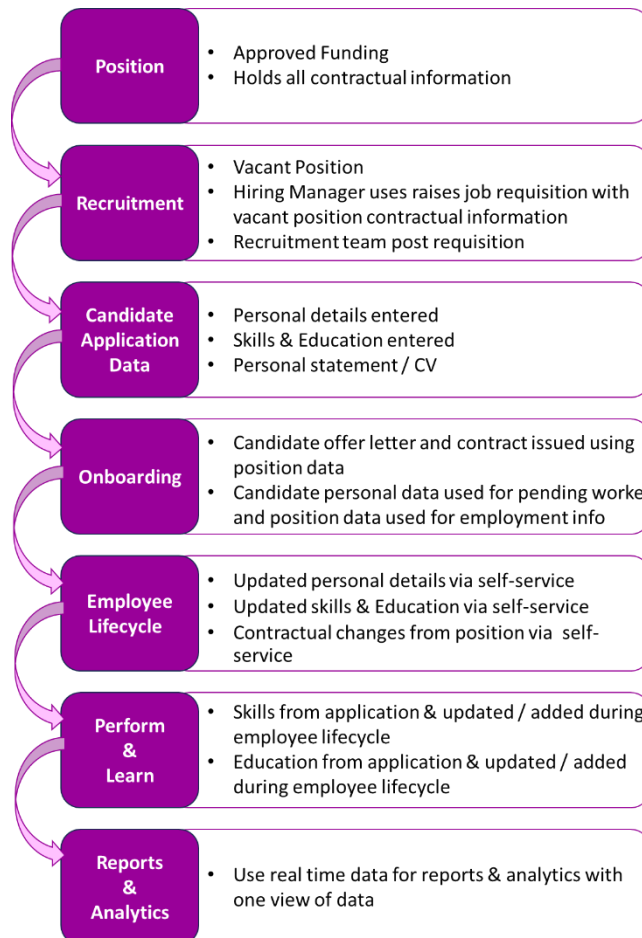

Figure 6 Benefits from HR and OD workstream.

It is important to note that the benefits of these interventions are to reduce administrative burden across employees, managers and the HR and OD teams. This will allow efficiencies through reduction in time taken on administrative tasks and delivering for residents.

There is the network benefit of having a single platform for all HR, finance, and procurement tasks, allowing the collection of better data, reducing training costs and hours lost to training on standalone systems along with the costs associated with maintaining and supporting these systems.

7.3.3. Success Measures

The success of the HR and OD improvement programme will be measured against the following criteria and benefits.

Table 5: HR & OD detailed benefits

Deliverable	Benefit Description	Baseline Position	Success Measure
HR and Finance information is aligned through new Establishment Management process	Oracle becomes a sole source of truth for finance and people related information. HR and finance colleagues understand roles and responsibilities. Tighter control and oversight of organisation changes	Fragmented position where information is incomplete or not understood. Misalignment between budget position and HR position.	New process agreed and understood. Procedures developed and reviewed periodically to align to Oracle best practice. New reports on positions, occupancy, and budget in alignment
New applicant tracking system	A candidate and hiring manager led solution to attract and develop people to meet the roles of the organisation. Internal candidates can apply for a range of roles and update their information	Standalone solution that requires significant administration and provides a poor candidate and hiring manager experience. Functionality difficult to understand.	Increase in the number of candidates applying for roles. Candidate satisfaction increased. Recruitment consultancy established
Enhancement to core HR	Simple and intuitive activities for employees and managers to undertake putting them in control of their data and management responsibilities	Separate forms and offline processes Forms require manual entry by HR administrators raising the risk of errors	Reduction in the % where ethnicity is not known. Five percent increase year on year of personal details
Time and Labour / Payroll	Reduce the administrative burden and focus payroll team on effective checking	Various forms and offline processes required to deliver monthly payroll	Reduction in offline forms

Deliverable	Benefit Description	Baseline Position	Success Measure
	and controls, ensuring staff are paid accurately and on time.	requiring significant administrative effort.	Minimise offline processes where possible. Improved reporting on compliance and exceptions
Talent management	There is a single online and learning platform that ensures staff are supported to deliver the organisation's objectives	Separate learning platform which is difficult to report on mandatory learning. Appraisal process is measured and tracked manually	Ability to report on mandatory learning completion. Ability to report on appraisal completion. Reduction in administration costs of admin
HR Helpdesk	There is a secure platform for managing queries and employee relations casework	Contact is maintained through various email addresses. Contact cannot be measured by service standards. Casework is maintained through spreadsheets offline.	Queries are responded within agreed service standards. Ability to regularly report on casework by protected characteristics.
Oracle Guided Learning	Simple tips and information to assist employees and managers complete self-service.	Users need to consult separate guides and information that need updating with the quarterly Oracle cycle.	Increase in self-service and reduction in queries to email inboxes for common tasks
Reporting and analytics	Employees and managers have the information they need to manage their team and do their jobs	Information needs to be run and cleansed by HR data team	Deployment of key reports and infolets (e.g. headcount, establishment, and recruitment information)

7.4. Implementation and Post Implementation arrangements.

This Improvement programme will be delivered by a joint programme team that includes Croydon and Mastek resources.

The council has invested in a dedicated Programme Delivery Manager to monitor and manage the delivery schedule and a Business Change Manager to drive improvements and embed organisational change.

These arrangements are outlined in the Finance and Procurement Business Case.

7.5. Milestone Plan

HR will focus its efforts for enhancement and implementation in a **three-phased approach**. This is to ensure the internal capacity and ability to take on board the changes are established before moving forward onto the next phase. We will work with our implementation partner, Mastek to refine the phases as the project progresses to maximise the opportunities for prompt delivery of features where possible.

Phase 1 Building the basis for success: Establishment Control will be the first phase as it forms the foundations of Human Resources and the Organisations ability to manage its financial position. This will be supported by elements within Core HR that are necessary to deliver sustainable employee and manager self-service, removing configurations that will prevent the council from achieving this.

Phase 2: Leveraging capability: Further elements of Core HR to support employee and manager self-service, payroll, the delivery of Oracle Recruiting Cloud and associated journeys for onboarding. Payroll to align with the improvements with core HR and recruiting and reduce manual processes.

Phase 3 Optimising: Enhancing and optimising Oracle Time and Labour (submission of casual working hours), talent management (including new appraisal and learning platform) and HR Helpdesk. The latter will be subject to further analysis to confirm it meets the requirements of the council. Further enhancements will be made to Core HR to ensure that modules within

The phases are set out in the table below.

Table 3: Proposed Potential Phased Sequencing

Phase 1 - building	Phase 2 - leveraging	Phase 3 - optimising
Core-HR - Enhancement using standard fields and removing previous configurations. - Development of standards and guides for handling changes and self service - Data cleansing	**Core HR** - Building requirements for Oracle Recruiting Cloud such as skills and qualification requirements	**Oracle Time and Labour** - New module - Submission of casual hours and overtime

Phase 1 - building	Phase 2 - leveraging	Phase 3 - optimising
Establishment Management - New process for approval of positions - Establishment of standards for changes and updates to finance and HR structures - Starters, Movers & Leavers foundations in place.	**Recruiting** - New module - Replacing current Taleo platform with a recruitment solution that is part of HR. - Will provide an intuitive and simplified way to recruit	**HR Helpdesk** - Handling queries and employee relation case management - Linked to key policies
Payroll - Enhancement seeking reduction of manual processes. - Alignment with new features and functionality	**Talent Management and Learn** - New module - Learning platform consolidation - Appraisal system - Career planning and succession	**Digital Assistant** - New module - Answering common queries - Support employees and managers undertake common tasks. - Works across HR, Procurement and Finance modules

The overall phases of the programme are set out below. Phase one (blue) sets out the detailed building blocks and foundations that are essential prior to moving to subsequent elements. Phase two (yellow) covers Oracle Recruiting Cloud and the additional core HR elements related to delivering it. Phase three (green) covers the new modules that can be implemented once the previous phases have been completed. There may be scope to commence some elements of phase three earlier and this will remain under review.

Lighter shaded areas reflect additional work anticipated to embed changes within the organisation which will be led by the programme team.

Table 6: Oracle improvement programme HR & OD key phases

	May 24	Jun 24	Jul 24	Aug 24	Sep 24	Oct 24	Nov 24	Dec 24	Jan 25	Feb 25	Mar 25	Apr 25	May 25	Jun 25	Jul 25	Aug 25	Sep 25	Oct 25	Nov 25	Dec 25
Establishment Management	light blue	light blue	blue	blue	blue	blue	blue	blue	light blue	light blue	light blue									
Core HR			blue	blue	blue	blue	blue	blue	yellow	yellow	yellow	yellow	yellow	yellow						
Payroll			blue	blue	blue	blue	blue	blue												
Learn									yellow	yellow	yellow	yellow	yellow	yellow						

Oracle Recruiting Cloud

Talent Management

Oracle Time and Labour (OTL)

HR Helpdesk

Digital Assistant

Estimated delivery dates have been included for all the key deliverables are included below.

Table 7: Oracle improvement programme HR & OD milestones

Workstream	Milestone Title	Milestone Description	Indicative End Date
Establishment Management	Develop principles	Establish principles and process for building and maintaining the HR structure in alignment with the financial hierarchy. Identify additional fields required within HR modules to support financial reporting, including the removal of positions no longer required or available. Map the position hierarchy of positions to be built into HR structure. Amend existing offline processes to ensure they capture data required for future workflow. Agree process for future workflow.	July 2024
Core HR	Foundations and enhancements	Develop standards for recording data fields within core HR to enable the delivery of subsequent modules. Focus on personal information, skills, and qualifications. Ensure Redwood is available across all HR modules. Delivery of additional fields required to support Oracle Recruiting Cloud and Talent Management Migration of data from separate document records into new fields	January 2025
Establishment Management	Deliver workflow within Oracle	Online workflow built within core HR with approval process	January 2025

Workstream	Milestone Title	Milestone Description	Indicative End Date
Payroll	Online enhancements	Delivery of the core payroll enhancements to simplify processing of payroll	January 2025
Recruitment	Delivery of Oracle Recruitment Cloud	Implementation of end-to-end recruitment and talent management platform	June 2025
Oracle Time and Labour	Online timesheets	Delivery of facility to allow for casual workers and overtime to be submitted online	December 2025
Learn	Delivery of Oracle Learn functionality	Implementation of learning platform.	December 2025
Talent Management	Online learning and appraisal	Delivery of the online appraisal solution and other talent solutions.	December 2025
HR Helpdesk	Front door and casework	Delivery of the customer "front door" and core case management solution	December 2025
Digital Assistant	New navigation	Delivery of the digital assistant that can work across Oracle modules to support employee and manager self-service with assisted AI and automation	December 2025

8. Detailed information on enhancements and new modules

The following section provides greater details on the proposed enhancements and new modules within Oracle HR.

8.1. Establishment management

The expected outcome for establishment management is:

Expected outcome	The use Manager Self-Service to be used for the control of establishment. Reducing duplication and external forms. Ensuring processes and system approvals are followed and within the agreed policies all within one system.

Currently the requests for establishment changes are made via an online MS form. The approvals are in place and the request is received in a generic email box and the system is updated by the HR Systems team. However, each month there is a disparity of the employee data to the finance data resulting in the use of finance journals to correct the staff costs and, at times, do not advise the HR Systems team on the required changes. This leads to mistrust of the data and impacts the budget managers monthly forecasting.

Accurate establishment data is key to the organisation for:

- Financial Management
- Workforce Planning
- Approvals
- Reporting and Analytics

Opportunities for Improvement

Managers request Establishment changes via Manager Self-Service

The establishment is the spine of the system and by using it correctly will give managers a clear view of their funded establishment and the staff within those positions. The manager will be responsible in controlling their establishment data and if incorrect will be required to raise the position changes via Manager Self-Service. Once completed an approval flow will sit behind the request and the final approval will be with the HR Systems team, who will check the data entered and will be the final approver. Once approved this request will be instantly visible in the manager's position management view.

This will reduce the duplication of data entry as the manager is responsible for entering the data, just as they currently do on the MS form, leaving additional data entry by the HR Systems team to minimal requirement. In addition, the approval process will be followed within the system and the time taken for the changes will be reduced.

*There will be a requirement to perform a validation exercise of all positions with budget managers and Directors, which will need to be a quick turnaround as the establishment is forever changing. Once signed off the system with the approved establishment in readiness for the roll out of manager self-service.

Utilising Position Synchronisation

Position Synchronisation can be utilised to maintain line management, particularly beneficial when a manager leaves, their staff will automatically report to the parent of the manager's position, reducing the need to manually move the staff to a new manager and reducing the approvals failures where there is not a manager in place.

This can also be used in the control of the grade and hours of the position, automatically updating the employee assignment. This will ensure the position data always matches the assignment data.

*There needs to be more investigation into the pros and cons of which fields should be used with position synchronisation. Along with a validation exercise ensuring position data matches with assignment data.

Using single incumbency

To ensure establishment management works as intended, each position can only have a single incumbent and the practices to ensure and manage this is maintained will need to be established.

Ensuring all workers are on the system.

To ensure Oracle is a single source of all workers, including contingent (temporary / agency) worker, all workers need to be recorded on the system and that positions agency workers are occupying are synchronised with the Managed Service Provider (Adecco).

8.2. Core HR

The expected outcome for HR Core is:

Expected outcome	The use of Employee and Manager Self-Service to be used and adopted throughout the Council, reducing duplication and handoffs, improving security, and ensuring system approvals are within the agreed policies.

The current use of self-service within the Council is limited and many processes to change staff records are performed outside of the system via Microsoft forms and excel forms sent by email to a generic HR inbox, which in turn need to be manually inputted by an HR administrator.

Historical decisions to configure the system now function as a barrier to implementing future modules. For example, Croydon uses document of records for equalities information that does not use the built-in functionality in personal details. Croydon has the third highest of London Councils where ethnicity is not known suggesting that there are currently barriers to the recording this information. Skills and qualifications are missing from the current configuration. This will prevent the smooth transfer of information using the new applicant tracking system.

Opportunities for Improvement

Reduce effort for position and assignment change requests.

The system is currently used for recording staff personal and employment information. Employees use self-service for:

- Entering annual leave
- Updating personal information including equalities information using the out of the box configuration
- Updating skills, qualifications, certifications, licenses (including those necessary for roles they are occupying – e.g. social work registrations, DBS, professional memberships).
- Submit their resignation.
- Viewing payslips, P60's & P11d's

Managers use self-service to:

- Record and manage employee's sickness absence.
- Add a Fit Note to Document of Record
- Complete Return to Work Document of Record
- Manage approvals from staff.
- View Establishment
- Line Manager Dashboard, offering a number of reports to assist managers.

Manager self-service can also be utilised to manage positions and assignment changes and by implementing these functions it will reduce the use of Microsoft forms and excel form sent via email and ensure the correct processes for approvals are followed and meeting one of the guiding principles "Move to 'on system' processes where possible". Managers will complete the request within the system and submit to the HR team and once accepted the system will update, therefore removing the need for transferring the data from the external forms and enter data into the system and in turn removing the duplication of effort.

There will be separate roles for HR administrators and payroll. Their role will shift from data entry to data validation, compliance an

Implement Individual Compensation Plans (ICPs)

ICP's allows employee and managers to request certain elements that will affect pay. Additionally, HR & Payroll specialists will also be able to set up plans against employee records with the terms and conditions of the payments built behind the plans. All ICP's are visible to employees and managers which are easy to report via employee benefit statements, dashboards, and enhanced reports. A few examples of where ICP's can be used are:

- Holidayplus request – employee completes ICP request, manager approves, HR approves, element is set up to deduct each month and annual leave balance is increased, removing the need for an external form and manual adjustments and batch uploads.
- Market Supplement – entered by manager or HR specialist, with a start and end date.
- First Aid Allowance – employee enters the request and uploads a copy of the certificate, manager & HR approves, element is set up to pay each month.
- Pay / Deduct annual leave for a leaver – manager enters the number of hours required to be actioned in the final pay of the leaver.

Use standard functionality for personal data.

Currently the sensitive personal data for an employee is recorded in a document of record. This was a work around implemented as Fusion did not have all the required fields built into the standard functionality. These fields are now available, and collection of data will be entered by the candidates as part of the recruitment process. It will be necessary to

implement prior to introducing Oracle Recruiting Cloud to ensure that the data from applicants is captured and transferred correctly.

Data currently recorded within the document of record may need to be migrated to the standard form to ensure all data is in one place and ease reporting.

Implement Contracts

As part of the movers (within Starters, Movers, Leavers processes) Oracle can also be used to issue changes to contracts for events such as secondments, acting up, etc. This could be developed further within various phases of implementation.

Unified solution options

As other modules are enhanced or implemented, this will enable a suite of tools, packaged as Oracle Me, to come online to provide a range of HR services, support, and information, such as structure charts and staff directory information.

8.3. Time & Labour and Payroll

The expected outcome for payroll processes is:

Expected outcome	The process for receiving pay data is robust and manual interactions are reduced within the payroll team. Enabling the payroll team to concentrate on effective checking and controls, ensuring staff are paid accurately and on time.

The Council has a duty to ensure that all employees are paid accurately and on time. The current processes for receiving and entering pay data into the system is manual and duplication of effort, particularly around the receiving of variable hours, such as, overtime and casual hours. The following opportunities for improvement, and potential enhancements were identified:

Opportunities for improvement

The system is successfully used for the processing of payroll; however, it is recognised there are several areas where there continues to be manual processes, or improvements could be made to improve the receipt and application of pay changes and variable pay.

Reduce manual effort of receiving and entering variable pay (overtime, casual hours, additional pay)

Variable pay is received into the payroll team via the payroll inbox in many formats.

- Scanned singular claim forms which are handwritten by the employee and signed by the manager.
- Detailed in the body of the email and sent from the manager.
- Small list of employees in a spreadsheet and attached to the email.
- Larger lists in a spreadsheet from departments who have a high volume of casual staff.

Implementing Time and Labour module will place the responsibility on the employee to enter the variable time worked and submit to the manager for approval. The manager will review the submitted time and approve, reject, or request more information. Once approved the payroll team will run the process to pull all approved claims into the employee record ready for the payroll process to be run. This will ensure application of the pay policies, reduce the

number of steps and interactions from 7 to 3, reducing the time taken and reducing the risk of error.

Improve Casual pay structures.

Currently the casual pay requests list the number of hours to be paid against an hourly rate. When a pay award is implemented, there is a manual process required to review all the hours claimed on the old rate and calculate the arrears due within the departments and sent to payroll to upload the arrears via HSDL.

Creating casual grades will remove the manual process, reduce the risk of paying the wrong hourly rate and remove the effort requires for manual calculation when a pay award is implemented, along with the HSDL upload of the data within the payroll team.

Improve element structures.

Payroll elements are attached to an employee payroll record and are the driver within the payroll process to ensure the employee is paid accurately.

Within the system there are a number of elements which have been designed to cover a variety of pay actions. This makes reporting difficult, along with updating after a pay award of increment and resulting in the elements being not fit for purpose.

A review of all elements to be performed and identify the requirement of new elements or Individual Compensation Plans (ICPs).

ICPs can be the responsibility of an employee, manager, or HR specialist, and each ICP can have its own approval rules. They can be set up for a recurring contractual payment or a one-off payment request. They can be reported on more easily and added to a manager's dashboard for visibility and control.

Use Standard Functionality for Pensions Automatic Enrolment

The system has standard functionality built to ensure the Pensions Regulator's legislative requirement is adhered to. The process is run each month and assess all employee's eligibility to be automatically enrolled into one of Croydon's Pension Schemes, LGPS or Teachers Pension, and dependant on the assessment and contractual terms of the employee will determine the correct pension scheme to be attached to and a letter produced to be sent to them informing them of the actions taken.

At the time of Croydon's implementation, a decision was made to manually override the PAE Calculation Card and manually attach them into the correct pension scheme, therefore not allowing the system to perform the process automatically. This can lead to a risk of non-compliance, particularly where casual workers are selected are manually excluded and therefore not assessed each pay month to see if they meet any regulations criteria and therefore being mandatorily brought into pension as per the Pensions Regulations.

It is recommended to revert the system to the standard built in functionality and run the process flows to determine employee's eligibility, ensuring compliance is followed. This may require a data cleansing exercise to be performed to review all casual employees' contractual terms set up within the system within their assignment record.

All Statutory & Contractual Absence Schemes to be built into the system.

A number of TUPE occupational sickness and maternity terms and conditions have not been built to automatically calculate entitlement within the system and therefore could lead to overpayment of salary.

It is recommended to have these additional occupational schemes built within the system reducing the requirement of manual calculation and reduce the risk of error.

8.4. Recruitment

Expected outcome	Croydon has a candidate and hiring manager led system that can attract the range of resources needed to deliver for Croydon residents

There are also features not used within the Recruitment process, due to the limitations of the existing recruitment platform. We will look to enhance and simplify the Recruitment Journey not only for the Candidate experience but also for the ease of those utilising and supporting these critical services and system.

Opportunities for Improvement

Improved user experience

The replacement for Taleo can offer several improvements over the current solution for the following user groups:

- Candidate – the candidate can apply using CV and supporting statement. Their CV can be parsed pulling through key data to streamline the application process. They do not need to create an account for their application but require only an email address. They can opt to receive updates for roles that can match their skills and experience. Internal candidates get a dedicated internal site to show the opportunities available across the organisation. This can be tailored to their interests and skills.
- Hiring Manager – the hiring manager can initiate the request to recruit from a list within their team view within Oracle. They can review online candidates and move them to shortlist or interview. The hiring manager can communicate with the candidates via the platform and request they select their interview slots.
- HR Recruitment – the recruitment team has overall control over the end-to-end recruitment process for compliance and assurance. They can support the hiring manager on sourcing and professional advice instead of focussing on administrative tasks.
- HR teams can ensure the accurate setup of candidates without the need for re-entering information as information from the recruiting platform is pushed directly into core HR as pending workers. They can instead focus on accuracy and compliance.

Improved data quality

- Establishment Accuracy – alongside the work for the establishment management, Oracle becomes the only source of truth for the organisation structure. Anomalies are identified through monthly budget meetings or through position change requests that are documented within the system. Each position will have a complete history of creation and changes with supporting information to document the changes.
- Payroll inconsistencies reduced as the system feeds directly into core HR. Errors are minimised due to a reduction in duplication of effort or re-entering information.
- Improved forecasting explanations – information on exit dates and entry dates are entered into the system providing more data points.
- Data flow Improvements and 'single source of truth' – monthly reconciliations arising from the new establishment management process will give reassurance the data is

accurate and reliable. Internal candidates, who form most applicants in any solution will also be updating their oracle record as they apply for jobs, which include their skills, qualifications,

Improved Reporting & Analytics

- Oracle Recruiting Cloud provides several dashboards for recruiting managers and hiring managers out of the box. This includes pipeline data, number of job vacancies, time to hire metrics. These will be useful metrics for recruitment teams, HR partners and senior management.
- For hiring managers there is a recruitment activity centre dashboard that shows them the tasks they need to undertake and what they need to do. They can also see what stage of the process they are at and the tasks they need to complete.
- For candidates they can see from their candidate page what stage of the application they are at. They can also opt in to receive updates from the council on future opportunities.

8.5. Talent Management and Learning

As described in the summary of recommendations, this is a new implementation as there is no single Talent Management system and many processes are currently completed offline (such as appraisals) requiring effort to collate and report. Therefore, any implementation will provide significant benefits and improvements to the Talent Management lifecycle.

Expected outcome	Croydon has a single platform for learning and development for its Oracle users that can enable the organisation to report on appraisal completion, mandatory learning, and future talent pipelines.

Opportunities for improvement

An integrated learning platform

- A single platform for online learning that can report on compliance with mandatory learning and link in with skills and qualifications with employees.
- Online learning content would still need to be procured by Croydon but could be curated in a single platform allowing for improved compliance and reporting and meeting accessibility standards. Learning would be delivered to workers (including agency) via the Oracle platform rather than a single standalone platform who have an Oracle account. The council would need to consider how to continue to deliver to non-Croydon workers.

A simple online appraisal solution

An online appraisal and one to one tool that can monitor objectives (called goals in Oracle) and performance. This will allow reporting on completion rates without having to manually collate and provide a platform for recording feedback, outlining development needs.

Talent and succession planning

The appraisal process can also be the foundation for identifying talent pipelines and staff development needs.

8.6. Reporting & Analytics

The expected outcome for Reporting & Analytics is:

Expected outcome	Croydon has the necessary reports to deliver statutory, partner and local metrics on demand using a variety of formats. End to end alignment of data which in turn will allow accurate real-time reporting across all modules and functions. Greater autonomy on pulling ESS and MSS style ad-hoc reports for Managers and Employees based on their role or Area of Responsibility / Position Hierarchy. Enhanced Targeted Reports, Analytics and KPI Driven Dashboards to enable meaningful workforce and life events strategic planning

The current directory of Oracle reports used is limited to OTBI created catalogue reports. These are manually created based on the request received. They are downloaded and manipulated in Excel and sent to the requestor by email.

Many of the seeded Dashboards are not used as they have not been configured for Croydon Council, rather these are templated reports and do not provide any meaningful statistics or insights.

Cross module or cross-functional reporting is not used due to non-existing data, formatting issues or reliability / publishing time of the data. In addition, access to load and analyse data by the reporting team is not being leveraged, due to training gaps and understanding of BIP reporting and its capabilities.

Opportunities for Improvement

- Real-time, accurate reporting of Establishment positions both filled and vacant for the full Organisation
- Recruitment lifecycle reporting, key statistics, targets, and trends from candidate application to onboarding.
- Creation of standard set of scheduled and dynamic reports, utilising agents, and scheduling functionality to reduce manual intervention of creating and sending reports direct to users from Oracle.
- Creation of automated Exception Reporting to enable easy identification of out of policy or approval required transactions.
- Configuration of targeted Dashboard style reports for Executives, Managers and Analysts to enable better workforce management, strategic planning, and insights.
- Use of Oracle Connections to pull Organisation structure charts and hierarchy reports.
- Accurate cross-functional and multi module HCM reporting utilising BIP and HCM Extract Reporting
- Reporting on Document of Records, management, and identification of archiving needs
- Enhance auditing through the usage of Oracle Risk Management Cloud, configuration of targeted transaction monitoring, access control and improved compliance.
- Reporting and traceability of outstanding Manager approvals, orphans and required workflow actions in-line with Starters, Movers, and Leavers processes.

- Training Employees and Managers based on their role and their access, the availability of self-service reports reducing workload impact to the Reporting analyst, delivery timeline & self-sufficiency benefits.
- Training Reporting & System Analysts standard and enhance Reporting capabilities in Oracle HCM to promote faster, accurate and dynamic reporting within the system rather than downloading and manually creating reports / dashboards in Excel.

8.7. User training and guidance

Expected outcome	Croydon has revised guidance, online information, and tips to guide managers and employees, so they know what they need to do at any stage of the employee life cycle.

A core driver for this programme is the effective use of systems to enable both front line and back-office functions to work more efficiently. A key enabler of this, in addition to having simplified processes, is to ensure that all users have the tools, skills and knowledge to use the technology and understand the processes.

Opportunities for improvement

The current system and applications are supported by numerous user guides and videos which were created as part of the previous implementation. Although many users do use the guides, there is still a significant proportion who do not engage with available training materials, and when they encounter challenges with the system, will either disengage with process, or raise service tickets requesting additional support.

The shift to a hybrid workforce has also affected how users learn as they no longer can ask for support from a colleague who is with them in the office. The changing workplace is requiring entirely new workstyles and skill sets for both workers and their managers.

The current approach to our Oracle training and learning is not achieving the desired outcome which is demonstrated with the level of disengagement and non-compliance with the system. It therefore requires a step change in how we approach this key area.

Oracle Guided Learning (OGL) is a digital adoption platform that is fully integrated with the Oracle solution, providing users with support as they require, guiding through a task, rather than have to read/watch the guidance before having to try and repeat.

OGL will provide the following benefits:

- Reducing reliance on help desk staff for routine issues by giving end users the just in time information to do the tasks at hand.
- Improve compliance with processes and policies as users will be provided with guidance and support when completing the process.
- Provide customisable content for employees and managers based on available libraries.
- Improve data quality by making it clear what is expected from the data creator.
- Improve the user experience and adoption when used need to engage with the applications.

- Increase the productivity of the internal training teams responsible for providing resources to professional end users.
- Enable rapid deployment of tips and guidance to targeted users when issues are identified.

8.8. HR Helpdesk

This is a new module that is recommended to be adopted once the other modules are in place.

Expected outcome	Croydon has a simple ticket-based system to manage common queries and manage informal and informal employee relations casework in a secure way.

Currently a range of email inboxes exist to contact HR teams. For casework, the current system is an excel spreadsheet and the risk of not having a CMS in place, increases the risk of data corruption or loss and increased manual intervention in reporting.

Opportunities for improvement

HR Helpdesk comes with a ticket-based system that can assign questions to HR colleagues or work with a knowledge base and the digital assistant to answer frequent questions via AI. This would replace the need for various email addresses. There would be a single contact point for all HR support.

HR Helpdesk also includes a detailed case management system that can work with the existing stable policies and procedures to support employees, managers and HR officers manage cases in line with policy and guidance.