

Oracle Fusion Programme Completion Report

One Council. One System.

Simpler, quicker, and better finance, HR and purchasing systems that help us make better-informed decisions, and deliver excellent outcomes for residents.



Programme Completion Report

Introduction

In 2019 the Council agreed to replace the current Oracle E-Business Suite on premise system with the modern 'Cloud based' Oracle Fusion system.

The project was formally agreed by Cabinet to pause in December 2021

In 2022 a 'Health Check' was completed which provided recommendations to ensure the following Oracle project was set up for a successful implementation.

In September 2022, a new System Integrator was appointed, and the Oracle Fusion Programme commenced a fresh implementation in October 22. The Oracle Fusion Programme completed implementation in October 24 and the aftercare phase 'Hypercare' in December 24.

The Programme followed a structured methodology and acted on lessons learned and the recommendations provided.

This Report provides a summary of the Programmes objectives, deliverables, management and lessons learned for future action.

The Report will be shared and presented with Scrutiny to request formal closure of Sandwell's Oracle Fusion Programme.



Programme Completion Report

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Oracle Fusion – Case for Change

In September 2019, Cabinet provided approval for Sandwell to proceed with the 'Replacement of the Council's Sandwell Business System (SBS)

Project Objectives

- To implement a sustainable, legally compliant business system, which is fit for purpose and satisfies the business need by December 2021.
- To transform services and generate efficiency savings.
- To support the Council's Vision 2030, where Sandwell has a national reputation for getting things done and ensuring that the Council keeps pace with technological developments and provide an improved service and user experience.

The main reason for the replacement project was due to the Council's current system 'Oracle E-Business Suite (EBS)' version 12.1.3, which was **unsupported from 31 December 2021**.

It was deemed an 'unacceptable risk to the Council due to the loss of service updates and support patches which are required to ensure that the software operates effectively and in accordance with appropriate legislation. In particular, the loss of support to the payroll module presents a particularly high risk for the Council.'

Standard risks to consider when operating the Organisation's critical business processes with an unsupported system include:

- Financial impacts – maintenance costs, security breach costs, compliance and risk penalties, downtime and outage costs, modernization and integration costs
- Outage impacts – disruption to the Organisation with additional time on governance & controls, delayed pay, offline working for critical activity like making payments
- Additional impacts which can lead to financial damage such as – loss of vendor support and SLAs, reputational damage, missed opportunities for innovation

An unsupported system is likely to incur more frequent outages, in 2022 SBS experienced a 2 week outage which **cost SMBC £136K**, there was a further outage in 2024 of 2 weeks and costs for this have not been confirmed.

An option to upgrade the Councils SBS system was available but would have only been supported until 2030 due to the Sector's transition to Cloud based Systems, the Council would therefore need to consider its options again ahead of this time. This upgrade for the Council was estimated at a cost of **£1,031K** plus ongoing maintenance, therefore the Council has avoided this cost by starting the project in 2019.

Programme Completion Report

Programme Initiation – Foundations for Successful Delivery

- Acting on recommendations from the Project Health Check and Lessons Learned from the previous Project
- Resetting the Strategic Priorities, building the Programme Vision and agreeing Design Principles to ensure the correct strategic direction at the outset
- Gaining 'buy in' from Stakeholders & building trust
- Ensuring a balanced resource model with the correct levels of capacity is in place
- Designing and implementing robust governance with the right level of stakeholders and support across the business
- Providing a focus on Change Management – to ensure the organization is brought on the journey
- From the outset, agreeing clear strategies with senior stakeholder ownership that set out how key activities will be delivered through the Implementation



Doing things differently

Based on the Health Check recommendations and key learnings, a new project was initiated in September 22:

- Programme was restarted with new governance, new external support, and additional resources
- A lessons learnt review identified a number of learnings
- Learnings and actions identified include:

Learning	Action
Make the most of the system's potential	Designed clear vision, design principles and approach
Improve controls to ensure the project is on track	More structured governance with clear "entry and exit" criteria at each stage
Build strong working relationships	Selected an experienced Service Integrator partner to deliver the technology solution
Communicate a clear case for change	Stronger focus on Change Management to ensure everyone is ready and supported throughout the transition
Effectively plan resources	Confident we have the right resources with all areas effectively represented
Ensure data migration plan is robust	More focus on existing data to ensure successful migration to the new Oracle Fusion



Sandwell MBC Vision

One Council One System. Simpler, quicker, and better finance, HR and purchasing systems that help us make better-informed decisions and deliver excellent outcomes for residents.



Our Design Principles

This programme will deliver to these core design principles as far as possible:



Transformation
not Lift & Shift



Adopt
not Adapt



Cloud first

- Adopt, not adapt / out-of-the box;
- Maximising self service and empowerment;
- Paper-free;
- No offline processes;
- Automation where possible;
- Oracle Fusion first (i.e., closing down satellite systems where possible or taking every opportunity to integrate with satellite systems where it supports the end-to-end process);
- One source of truth – Oracle Fusion as the core source of HR & Finance information.

The only instances where exceptions to these principles will be considered are where they will lead to:

- Incorrect payments to staff or suppliers;
- Failure to meet statutory/ legal/ regulatory requirements;
- Risks to health, safety or wellbeing.
- Or where the business case outweighs the benefits of Oracle in terms of combined budget, benefits, user experience, productivity etc

Sandwell MBC Oracle Fusion strategic priorities

Strategic priority	Benefits
Best practice processes	Process efficiency / productivity Digital organisation (paper free)
Service effectiveness	'One-Sandwell' – consistency of processes Self-service, employee empowerment Corporate Services move from transactional to strategic / assurance
User experience	Engaged workforce / employer brand Reputation with supply chain
Informed decision-making	Informed decision-making / business intelligence One source of the truth
Continuous improvement	Platform for innovation
Social value	Social value
Financial effectiveness	Savings Potential for income generation



Learning: Structured Governance



FORTNIGHTLY

- Monitor progress
- Approval of major decisions/ milestone signoff
- Escalation point for risks and issues
- Approval of milestone/ payment release



FORTNIGHTLY

- Confirmation of the outcomes and benefits to be delivered by the Programme
- Custodians of the Design Principles and ensure alignment
- Provide appropriate challenge to any deviations from standard process
- Impact assess and advise on any design decisions



Board

Working Group

Pre-implementation only



Mobilised



To Be Mobilised



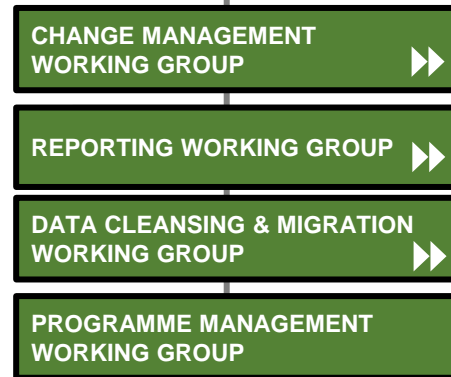
WEEKLY

- Monitor and report on delivery progress of all programme workstreams
- Discuss programme risks, issues and dependencies



FORTNIGHTLY

- Agree the Implementation Principles / Requirements to be fed into ITT and inform the implementation plan
- Overall ownership of the full Implementation Plan
- Agreement of resources required for Implementation
- Oversight over Implementation Mobilisation activity
- Advisory on the Change Management activities to ensure they deliver Business Readiness
- Agree the business readiness criteria and measurement methodology and own the service transition/ deployment/ cutover plan
- Holding all other workstreams to account for delivering to Business Readiness criteria



Change Management Strategies | Plans Training | Communications | Change narratives | Stakeholder Mapping/Management | Change Network

Reporting Requirements Reporting schedule

Oversight of Data Cleansing and Data Quality Improvement activities | Development of Data Governance Structures

RAID, Implementation Planning | Implementation Resourcing | Logistics, tools and Artefacts preparation | Team mobilisation



HR and Payroll functional requirements
HR Org architecture decisions
Benefits



WEEKLY



Finance functional requirements
Finance org architecture decisions
Benefits



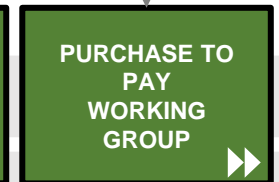
WEEKLY



Technical Requirements / Interfaces
Architecture / Environments / Testing / Decommissioning
Benefits



WEEKLY



Procurement functional requirements
Procurement org architecture decisions
Benefits

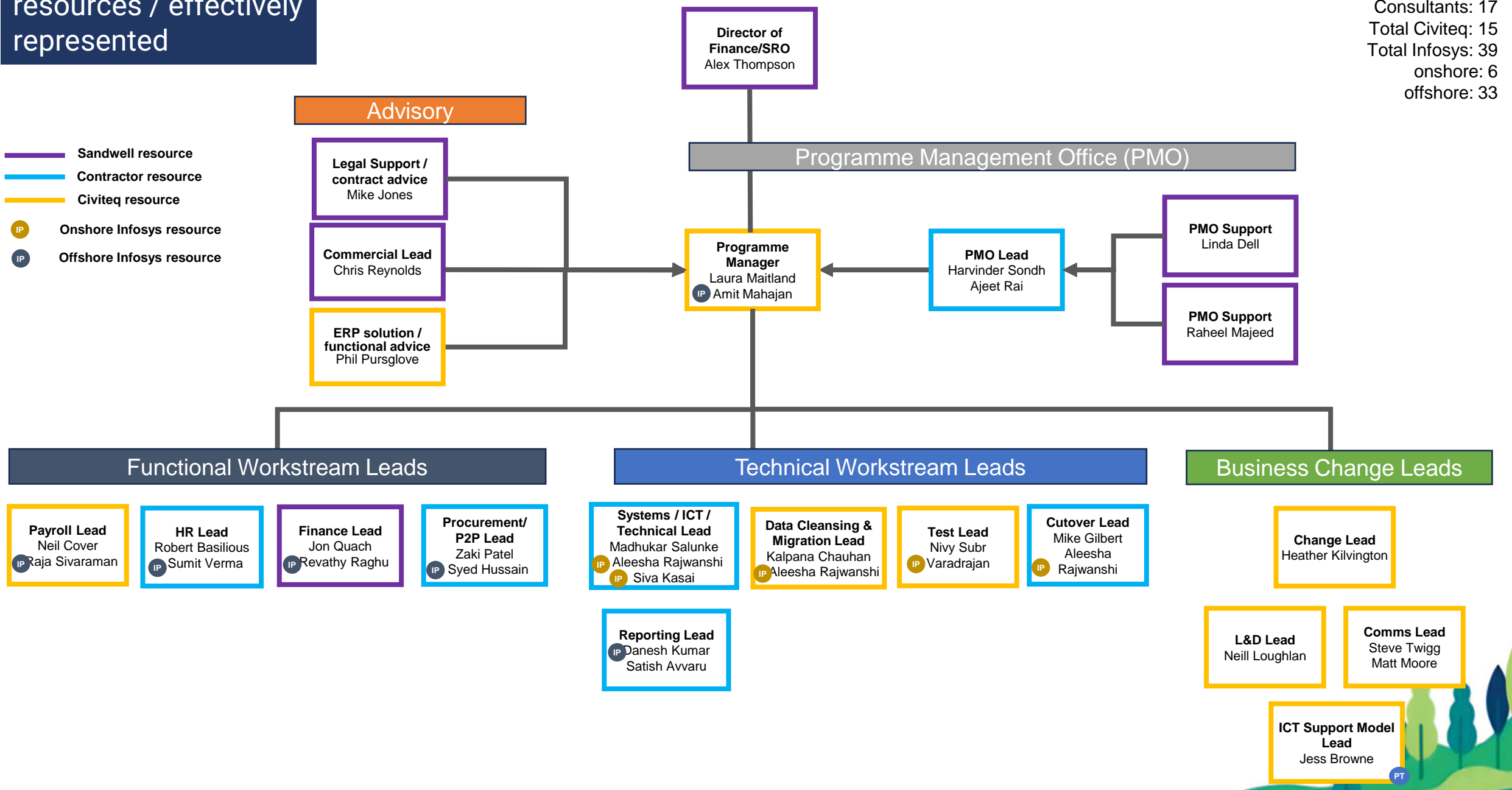


WEEKLY

Learning: Right resources / effectively represented

Oracle Fusion Programme Organization Chart

Total Prog Team: 120
SMBC / SCT: 56
Consultants: 17
Total Civiteq: 15
Total Infosys: 39
onshore: 6
offshore: 33



Building the mindset for change

Our approach to change understands people need to move through different mindsets to successfully adopt change

Commitment to change existing ways of working

- As-is process analysis
- Vision/Case for change
- Stakeholder mapping
- Communications & engagement

Consensus on future direction

- Change Impact Assessments
- Stakeholder mapping
- Stakeholder engagement
- Communications & engagement
- Learning Needs Analysis & Planning
- Validate Change Impacts & Benefits
- Build change network
- Assess Readiness
- Communications & engagement

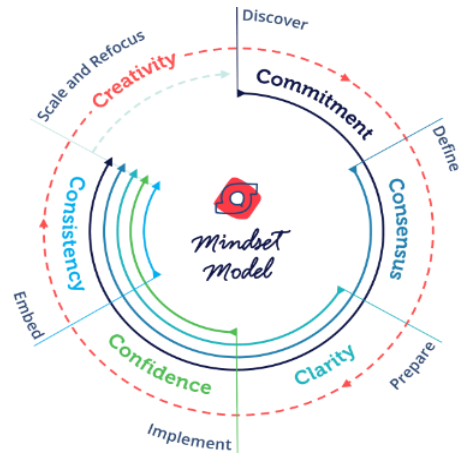
Clarity on the journey ahead and personal impacts

- User training delivery
- Knowledge Library
- Change Network support
- Assess Readiness
- Communications & engagement
- Assess Adoption/Readiness
- Benefits Realisation/Trackir
- Celebrate successes
- Change Network
- Communications and engagement

Confidence in knowledge and ability to succeed

Consistency in applying new practices

Creativity in shaping solutions and opportunities to improve



Elements of the Change Strategy

There are three key pillars of Change Management activity



BUSINESS CHANGE & READINESS

- Establish a **Business Readiness Framework** to deliver structured business readiness analysis and planning
- **Monitor business readiness and adoption of changes**, providing opportunities for interaction and feedback from impacted groups
- Work with Business Leads/Key Users to complete detailed **change impact & business readiness analysis/planning**
- Ensure consensus and clarity of **change impacts** and required business readiness interventions, identifying **training and communications needs**
- **Identify risks** and share with programme team
- Mobilise a **network of change agents** to support the cascade of training and comms collateral to impacted end users
- **Benefit** analysis, tracking, and benefit forum



COMMUNICATIONS

- Develop a **clear and engaging narrative** that communicates the programme vision, what is changing and helps people **see the benefits**
- Identify all persons or organisations that are affected by or have an interest in the activities of the programme through **stakeholder management**
- Generate a broad **awareness of ERP change** across the organisation, and regular updates on programme progress.
- **Deliver briefings** to impacted management teams to build consensus, clarity, confidence etc.
- Support/coach **senior sponsors and leaders** to ensure they are actively and consistently advocating the change and key messages
- Deliver multi-channel updates to **communicate milestones & successes**
- **Support L&D plan** to optimise attendance, engagement and learning



LEARNING & DEVELOPMENT

- Complete a **Learning Needs Analysis** to identify the knowledge, skills, tools and behaviours individuals need to adapt to identified changes
- Deliver **key/SME User Training** to key users to build knowledge and understanding of system changes and grow a community of SMEs to support wider training objectives
- Plan, develop and deliver **End User Training** to prepare individuals and teams for new processes and ways of working – using a variety of delivery formats and media to suit different learning styles
- Develop useful reference resources to **help people upskill** (e.g. training material) **and do their job** (e.g. how-to guide, run books etc)
- Build a **Knowledge Library** as a permanent central source of reference for all ERP Cloud guidance

Strong foundations / clear strategies

[Learning and Development Strategy](#)

[Test Strategy](#)

[Reporting Strategy](#)

[Data Migration Strategy](#)

[Environments Strategy](#)

[Integrations Strategy](#)

[IDCS / SSO Strategy](#)

[Project Initiation Document \(PID\)](#)



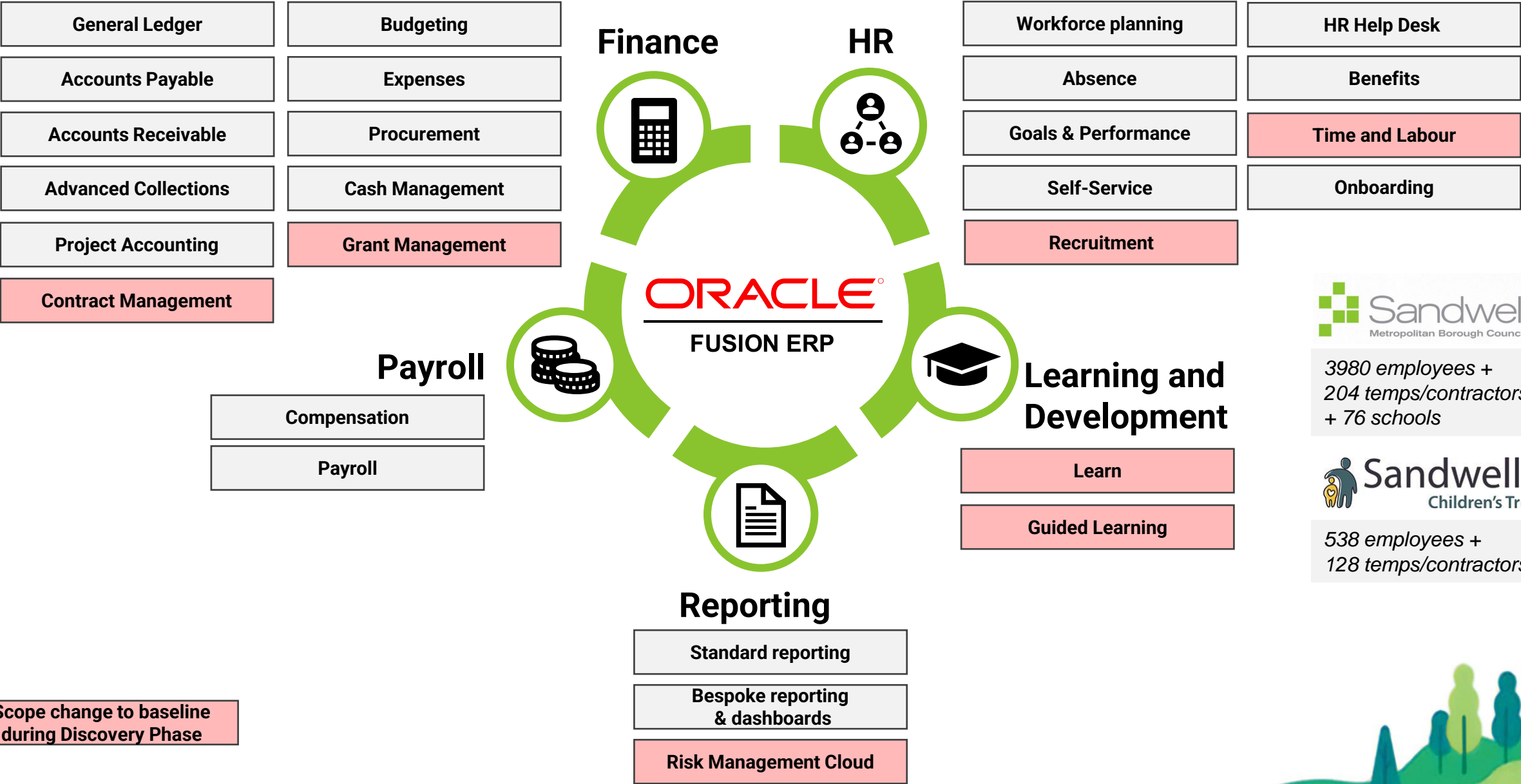
Programme Completion Report

Programme Governance & Controls

- It is normal for a Programme of this scale and complexity to make changes to the time, cost, quality and scope of the Programme. It is essential that the correct decision making forums are in place to enable those changes to be considered.
- During the Discovery & Design Phase additional modules were identified as important to Sandwell to enhance the transformation journey and support delivery of the agreed Strategic Priorities.
- A number of key decisions were made at the Programme Board in relation to time, cost and resources.
- The Business & Technical Design Authority (BTDA) considered requests about changes to scope, design and requests to implement design which resulting in customization – so was therefore against our Programme Design Principles. During the life of the Programme, the BTDA approved 55 Change Requests.
- The Programme Risk Log held Programme level and escalated Worksteam Risks & Issues, mitigating actions were clear and time bound. Programme Risks were reviewed at the Programme Board on a fortnightly basis.
- Total Programme spend is within the budget agreed by Members.
- Programme Benefits were identified during the Programme implementation and baselined post Programme Closure. All confirmed benefits map back to the Strategic Benefits and Priorities agreed at the outset and therefore evidence their delivery.



Scope



3980 employees +
204 temps/contractors
+ 76 schools

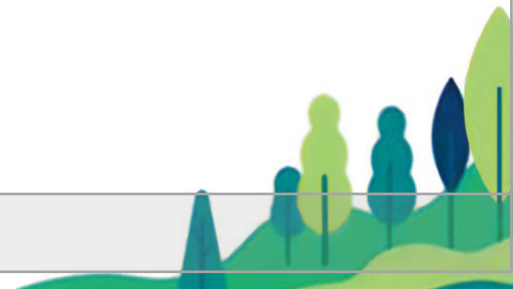


538 employees +
128 temps/contractors



Timeline / Cost / Resource impacts

Date	Programme Board decision	Impact	Forecast Go-Live
Nov 22	Original Baseline plan	Plan	Apr 24 – all workstreams
Jun 23	Gateway 2 Modelling Ph exit extension for HCM (9/6 - 30/06)	Plan – 3 week delay	Apr 24 – all workstreams
Jul 23	Gateway 2 Modelling Ph exit extension for HCM (30/06 – 26/07) Additional resource due to condensed plan / overlapping activities	Plan – 4 week delay Resource increase across workstreams Budget + £890K	Apr 24 – all workstreams
Sep 23	Gateway 2 exit for HCM / Gateway 3 exit for Fin & Proc Approval of Phased plan	Plan – 8 week delay	Apr 24 – PH1 Fin, Proc, EPM, Core HR Jul 24 – PH2 HR, Payroll, Expenses
Oct 23	Additional resources for HCM approved	Resource increase HCM Budget + £530K	As above
Oct 23	Phased plan associated costs approved	Resource ext Budget + £1.1M	As above
Nov 23	Gateway 3 exit for HCM	Gateway	As above
Nov 23	Approval of changes to the Chart of Accounts Approval of timeline change – 3 month delay to Fin and Proc which enables a go-live for all workstreams Approval of associated extensions to Fin & Proc resources	Plan – 12 week delay Resource increase – Fin & Proc Budget + £543K	July 24 – all workstreams
Feb 24	Gateway 4 exit from SIT for all workstreams / UAT entry	Gateway	As above



Timeline / Cost / Resource impacts

Date	Programme Board decision	Impact	Forecast Go-Live
Feb 24	Gateway 4 - exit from SIT for all workstreams / UAT entry	Gateway	As above
Jun 24	Gateway 5 - UAT exit for all workstreams	Gateway	As above
July 24	Gateway 6 - Go / No Go – decision No Go due to no of outstanding issues Increased scope for PPR2 – all payrolls Approval of timeline change – 2 month delay (9 weeks) Approval of resource extensions for 2 months for all workstreams	No Go Plan – 9 week delay Budget + £1.49M	Oct 24 - all workstreams
Aug 24	Gateway 7 - PPR Exit	Gateway	As above
Sep 24	Gateway 6 – Go / No Go approval to proceed	Gateway	As above
1 Oct	Go-Live HR & Payroll	Gateway	
14 Oct	Go-Live Fin & Proc	Gateway	
21 Oct	Go-Live End Users & School Business Managers	Gateway	
22 Oct	Go-Live Schools & Suppliers	Gateway	

5 Baseline plan changes

3 Go-Live date extensions

Original baseline
Go-Live change
+ 6 months

5 Board level
budget
approvals
(+£4.5M)

5 Resource
increase
decisions



Budget Summary

Detail - Budget	Value	Notes
Original Capital Budget	9,744	Approved by Cabinet in January 2023
Additional Capital Budget	1,216	Approved by Cabinet in September 2024 as part of Q1 Budget Monitoring Report
Additional Capital Budget	2,000	Approved by Cabinet in September 2024 as part of Q1 Budget Monitoring Report
Additional Capital Budget	690	Approved by Cabinet in September 2024 as part of Q1 Budget Monitoring Report
HRA Contribution	3,164	
Revenue Reserve	1,300	Available to fund revenue costs or as an additional contribution to capital costs if required
Revenue Budget 2022/23	561	Used to fund revenue expenditure within 2022/23
Total Allocation	18,675	
Detail - Phase 1 & Hypercare Costs	Value	Notes
SMBC Resource & External Agency Resource	7,056	
Programme Management - Soctim	3,442	
System Integrator	4,138	
Pre Implementation Costs - Soctim	126	
Admin Expenses	46	
Licence Fees - Non system	11	
3rd party development Costs (Integrations)	76	
Change Requests	264	
Archive Solution	83	
Licence Fees - System	2,809	
Fusion Archive Solution	94	
Support Model	180	
Additional Test Environment for Oracle Fusion Cloud Service	1	
Services Project Lead	57	
Total Spend	18,383	
(Surplus)/Deficit	(292)	
Detail - Support Costs	Value	Notes
Licence Fees	3	
Oracle Fusion Support Team	323	
Total Spend	327	
(Surplus)/Deficit	35	

Change Control

No of BTDA Change Requests	55	£251,674
Finance	19	£ 37,420
Procurement	03	£ 3,637
EPM	04	£ 112,618
HR	15	£ 55,972
Payroll	03	£ 3,550
ICT	10	£ 21,477
New modules	01	£ 17,000

No of minor Change Requests	266	30 added in Hypercare
Finance	29	
Procurement	5	
EPM	5	
HR	182	
Payroll	35	
ICT	10	



11 risks will be carried forward to be monitored as part of Support Model Governance

Risk log summary

Oracle Fusion Project Strategic Risks reported

2024

Board Date		18/01	01/02	29/02	14/03	26/03	11/04	25/04	23/05	06/06	20/06	04/07	18/07	01/08	15/08	29/08	25/09	24/10	07/11	17/12
Current RAG	Risks closed since previous meeting	5	3	6	3	1	1	1	3	1	2	4	0	13	1	0	2	5	3	1
	Number of new Risks raised	6	8	2	0	2	2	1	0	6	6	3	2	1	3	3	2	2	0	3
	Total number of current Risks	17	22	18	15	16	17	17	14	19	23	22	24	11	13	16	16	13	10	12
	Red	7	7	6	6	4	6	7	5	7	10	9	4	1	1	1	2	0	0	0
	Amber	10	14	11	8	11	10	7	8	9	12	9	19	8	11	12	9	8	5	7
Current RAG	Green	0	1	1	0	0	0	0	0	1	1	1	1	1	1	1	0	2	2	2
	Number of Risks requests to be closed	0	0	0	1	1	1	3	1	2	2	3	13	1	0	2	5	3	1	3

Best Practice Approach



Identify

Identify **high level benefits** and map against **strategic benefits** and overall vision



Define

Produce **Benefits Approach**

Identify the **core KPI benefits** and align to the Benefits Map



Plan

Capture **changes that support benefits** in Change Impact Assessment

Align low level KPI to the Benefits Map

Review Benefits Map core KPI benefits to confirm critical list of specific, measurable, achievable, relevant and time-bound benefits (>50)

Move critical list of core KPI benefits into the **Benefits Realisation Tracker**, the updated form of the Benefits Map

Identify **benefit owners** for each benefit, and agree ownership and responsibilities

Benefit owners produce **benefit profiles**, to inform Benefits Realisation Tracker

Identify **baseline** for all core KPI benefits



Realise

Monitor benefits realisation with Benefit owners

Regularly **report benefits dashboard** to agreed strategic governance (by exception or at agreed trigger points)



Review

Review realisation against plan, using benefits dashboard



Continuously Improve

Continue to review realisation against plan

New critical benefits agreed, profiled, owned, and tracked following new releases through future support model

Benefits

- Financial benefits targets set for cabinet report of £526K in FY24/25
- High level benefits identified and mapped to strategic priorities in early stages of project
- KPI level benefits identified and mapped in early stages of project
- Benefit activity put on hold during implementation due to other priorities and changes taking place in functional areas
- **During Q1 2025** – review of benefits captured and identification of further benefits, baselines and targets to take place



Prioritisation of Strategic Headers

Identify **high level benefits** and map against **strategic benefits** and overall vision

Function / Area	£	The most important strategic header	Strategic header description	Lower level-benefits selected against the strategic header
Finance	✓	Informed decision-making / business intelligence	More strategic financial support role as dictated by the CIPFA review	<ul style="list-style-type: none"> Budget Managers drawing on in-system forecasting reporting Budget Manager perceived usefulness of budget dashboard information Improved quality of forecasting outcome (Improved data quality such as accuracy of financial forecasting)
HR & Payroll	✓	One Source of the truth	Information into HR is from one source only, meaning less systems to maintain.	<ul style="list-style-type: none"> System used as a core source of organisational data and insight
IT		Platform for innovation	To maximise the benefits of Oracle SaaS.	<ul style="list-style-type: none"> Taking advantage of new developments in the solution e.g. quarterly releases
Procurement	✓	One Source of the truth	Finance & procurement can view the actual spend analytics and supplier performances for Procurement & Payments	<ul style="list-style-type: none"> System used as a core source of organisational data and insight
Reporting	✓	One Source of the truth	One source to obtain information rather than pulling data from multiple sources and combining, eliminates the risk of errors and inaccurate information.	<ul style="list-style-type: none"> Budget managers using in-system budget management reports (not creating separate spreadsheets)



Sandwell's Benefits identified by Function Leads

Identify the **core KPI benefits** and align to the Benefits Map

Corporate Services move from transactional to strategic / assurance "Reduction in Finance support in clarifying dashboard content" Reduction in no. of requests to update employee personal data into support team	Informed decision-making / business intelligence Budget Managers drawing on in-system forecasting reporting Budget Manager perceived usefulness of budget dashboard information People Manager perceived usefulness of people management information Improved councillor access to dashboard information Improved quality of forecasting outcome (Improved data quality such as accuracy of financial forecasting) Improved ability to understand organisation capability/ skills gaps, including the ability to forecast future skills requirements	Process efficiency / productivity AR - Time taken to build reports on outstanding revenue A <u>cost effective</u> Finance Service A <u>cost effective</u> Payroll service A <u>cost effective</u> HR service Reduced Payroll Processing Time and reduction in payroll errors Requisitioned process made more efficient by the right information provided at the right time Reduction in paper / off-system forms and documents Improved quality and accuracy of reports Immediate access to key data and ability to execute reports directly from one source of truth Improved automation with standardized delivery of information using Reporting Tools Complete reporting tasks and make any adjustments quickly and easily Automation of Unpaid Leave	Social value Amount of spend with local suppliers Savings Savings from decommissioning replaced systems Reduction in printing costs (in finance, HR, exchequer, payroll but also across the organisation) Self-service, employee empowerment Employees use <u>self service</u> learning content Employee Self Service Claims Platform for innovation Taking advantage of new developments in the solution e.g. quarterly releases
Engaged workforce / employer brand All employees are able to access all necessary ERP functionality from offices, home or remotely e.g. timesheets, payslips, expense claims remotely Supporting flexible working and a disparate workforce with tools that allow seamless interaction and collaboration.	One source of the truth Budget managers using in-system budget management reports (not creating separate spreadsheets) System used as a core source of organisational data and insight	Process compliance No. of centralised purchasing categories & budgets in place with allocated approval routes e.g. IT	
Potential for income generation Excellent user experience of the system	Reputation with supply chain Suppliers paid on time		

Strategic Priorities & Benefits

Informed Decision Making / Business Intelligence

Cleansed data for Customers and Suppliers. Reports across functions provide improved Business Intelligence at the touch of a button. Improved workforce data and reporting by Oct 25. Contract Management process in Fusion providing full Contract visibility & MI from Jun 25.

One Source of the Truth

Consolidation of data into 'one' System – for Learning, Recruitment, Contracts, Governors & Volunteers, Grants Mgmt process, timecards, accumulated leave, work schedules with further transformations planned

Engaged workforce / Employer Brand

Guided learning supports end users at the point of using the process. Improved self service processes for employees including expenses, absences & leave, timecard improvements (Apr 25) with further enhancements planned

Reputation with Supply Chain

Efficiency in the requisitioner process, improved response times for information, automated remittance advice, improved timeliness of supplier payments.

Social Value

Capture & reporting of local spend
A more efficient process for Grantees

'One-Sandwell' – consistency of processes

Further development of the HR Helpdesk to ensure all queries can be managed within the system and to include Payroll query management - improving consistency, offline working and response times.

Self-service, employee empowerment

Increased levels of self service for everybody, improved access to reports and MI
Self Service learning content all in one place

Corporate Services move from transactional to strategic / assurance

Implementation of the Grants Management Process, and from April 26 - Roll out of Budget Monitoring process & improved automation of the Bank Rec will support a move from transactional activity to allow teams to concentrate on more strategic, value added work

Process efficiency / productivity

20 gains for Professional teams 14,275 hours FYE / 1903 days / 7.4 years: VS 8 impacts – 7203 hours FYE / 960 days / 3.7 Years
Requisitioners will benefit from 50% quicker approvals saving 16,847 hours per month

Digital organization / paper free

Reduction in printed payslips, invoices, remittances, Dunning Letters and PO's with email as preferred method. Ongoing transition of off system process online including flexi, shift patterns, absences, overtime & further optimisation planned for offline processes and forms

Platform for innovation

Bringing the Grantees Process online utilizing Oracle standard functionality
Continuous improvement of Fusion processes via Oracle quarterly releases, providing ongoing enhancement and benefits opportunities.

Savings

£1.747M of annual recurring savings which include system savings, reductions in print & postage, reduction in manual payments, external costs for spend analysis. MTFS savings for Finance, HR & early payment discounts.
In addition cost avoidance savings (1 off) of £1M for upgrade and technology refresh related to SBS.

Improved Compliance & Risk Reduction

Clear & Transparent Financial approval matrix & approvals process, Journals process compliance, Improved System Security and Segregation of Duty Monitoring, Auto-provisioning of roles and access, Efficient and automated Starters, Movers, Leavers process, Automated Mandatory Learning scheduling and MI, Improved contract visibility and MI, timeliness for Supplier Payments, Implementation of No Po No Pay Policy, Process & System, Bank rec automation, Compliant BACS process, Centralised process to monitor organisational risks related to fusion transactional processes & professional roles, with Audit oversight, Improved compliance with audit requirements.



31

1

2

13

13

1

3

3

2

2

1

4

13 Financial Savings

4 MTFS Savings profiles

£9.7M

5 year saving

£17.8M

10 year saving

Financial Savings

Replacement of 3rd party systems / SBS / avoidance of spend on SBS upgrades

Finance restructure savings in anticipation of Fusion from 22/23 + MTFS target savings

MTFS target savings to be realized through productivity gains and churn

MTFS target savings by offering discounts for payments within 30 days

Printing & postage savings by moving to email where possible

Savings for 3rd party spend analysis by bringing online

Function delivering the saving	24/25	25/26	26/27	Total 25-30	10 Year Total
ICT	£238,972	£2,013,067	£1,064,442	£6,509,807	£11,373,801
ICT	£238,972	£2,013,067	£1,064,442	£6,509,807	£11,373,801
Savings from decommissioning SBS	£195,131	£780,523	£780,523	£4,097,746	£8,000,361
Savings from avoiding future System upgrades	£0	£1,031,500	£82,875	£1,363,000	£1,363,000
Savings from decommissioning replaced systems	£43,841	£127,739	£127,739	£682,536	£1,277,390
Electronic Devices returned by leavers	£0	£73,305	£73,305	£366,525	£733,050
Finance	£130,632	£193,064	£366,564	£1,789,952	£3,492,140
ALL	£126,000	£183,800	£357,300	£1,739,000	£3,399,500
A cost effective Finance Service	£0	£57,800	£231,300	£983,000	£2,139,500
Finance Restructure savings	£126,000	£126,000	£126,000	£756,000	£1,260,000
AR	£4,632	£9,264	£9,264	£50,952	£92,640
Reduction in printing costs in Finance	£4,632	£9,264	£9,264	£50,952	£92,640
HR	£0	£35,000	£268,700	£1,109,800	£2,453,300
ALL	£0	£35,000	£268,700	£1,109,800	£2,453,300
A cost effective HR Service	£0	£35,000	£268,700	£1,109,800	£2,453,300
Procurement	£8,000	£33,000	£33,000	£173,000	£330,000
Procurement	£8,000	£33,000	£33,000	£173,000	£330,000
Early payment discounts	£0	£25,000	£25,000	£125,000	£250,000
Spend analysis saving	£8,000	£8,000	£8,000	£48,000	£80,000
Payroll	£900	£14,454	£14,832	£74,682	£147,942
Payroll	£900	£14,454	£14,832	£74,682	£147,942
HMRC File retrieval	£0	£11,520	£11,520	£57,600	£115,200
Reduced printing of payslips	£900	£1,800	£1,800	£9,900	£18,000
Reduced number of manual payments to new starters	£0	£1,134	£1,512	£7,182	£14,742
Grand Total	£378,504	£2,288,585	£1,747,538	£9,657,241	£17,797,183

Productivity Benefits

Benefits shown below are productivity savings in hours per annum

Benefit Group	24/25	25/26	26/27	27/28	28/29	29/30	5 Years	10 Years
FINANCE	129.96	3175.92	7203.12	10536.92	10536.92	10536.92	42119.76	94674.4
AP	99.96	3115.92	7143.12	10476.92	10476.92	10476.92	41789.76	94074.4
AR	30	60	60	60	60	60	330	600
FUNERAL SERVICES	120	240	240	240	240	240	1320	2400
FUNERAL SERVICES	120	240	240	240	240	240	1320	2400
GRANTS	112.5	562.5	562.5	562.5	562.5	562.5	2925	5625
VCS GRANTS TEAM	112.5	562.5	562.5	562.5	562.5	562.5	2925	5625
HR	-395.88	1244.09	1520.04	1520.04	1520.04	1520.04	6928.37	14924.45
HR ADMIN	-397.38	291.46	481.08	481.08	481.08	481.08	1818.4	4621.18
HR RECRUITMENT TEAM	0	949.63	1035.96	1035.96	1035.96	1035.96	5093.47	10273.27
HR SCHOOLS ADMIN	1.5	3	3	3	3	3	16.5	30
IT	169.5	339	339	339	339	339	1864.5	3390
IT	169.5	339	339	339	339	339	1864.5	3390
PAYROLL	-132	828.275	1121.7	1121.7	1121.7	1121.7	5183.075	10923.575
PAYROLL	-132	828.275	1121.7	1121.7	1121.7	1121.7	5183.075	10923.575
SUPPORT TEAM	97.5	195	195	195	195	195	1072.5	1950
SUPPORT TEAM	97.5	195	195	195	195	195	1072.5	1950
REQUISITIONERS	84235.95	202166.28	202166.28	202166.28	202166.28	202166.28	1095067.35	6486168.15
REQUISITIONERS	84235.95	202166.28	202166.28	202166.28	202166.28	202166.28	1095067.35	6486168.15
Grand Total	84337.53	208751.065	213347.64	216681.44	216681.44	216681.44	1156480.555	6620055.575

Major process improvements to the Requisitioner Process Reducing the process from more than **2 days to less than 1 day** for 81% of approvals, a total of **16,847 hours per month** quicker to gain approval for Requisitions!

The Funeral Services team – are now benefitting from an automated invoicing service saving around **15 mins per invoice / 20 hours per month**

Professional Teams improvements by 25/26 achieving 6345 hours of productivity equivalent to **846 days / 39.5 months / 3.3 years**

Professional Teams improvements by 26/27 achieving 10,941 hours of productivity equivalent to **1459 days / 68.2 months / 5.7 years**

Professional Teams improvements by 27/28 achieving 14,275 hours of productivity equivalent to **1903 days / 89 months / 7.4 years**

Productivity Impacts

Benefits shown below are productivity savings in hours per annum

Benefit Group	24/25	25/26	26/27	27/28	28/29	29/30	5 Years	10 Years
FINANCE								
AP								
Increased effort for Non PO invoices	-30	-615	-780	-156	-156	-156	-1893	-2643
Increased effort for duplicate invoices	-576	-1152	-1152	-1560	-1560	-1560	-7560	-14784
HR								
HR ADMIN								
Approval Delegation - SMBC	-2.4	-4.8	-4.8	-4.8	-4.8	-4.8	-26.4	-48
Legacy pay queries	-110	-50	0	0	0	0	-160	-50
Updates to contracts with work schedule changes	-222	-444	-444	-444	-444	-444	-2442	-4440
Work Schedules administration	-961.98	-1923.96	-1923.96	-1923.96	-1923.96	-1923.96	-10581.78	-19239.6
HR SCHOOLS ADMIN								
Approval Delegation - Schools	-0.72	-1.44	-1.44	-1.44	-1.44	-1.44	-7.92	-14.4
HRHD								
Increased queries for HRHD	-1556.7	-3113.4	-3113.4	-3113.4	-3113.4	-3113.4	-17123.7	-31134
Grand Total	-3459.8	-7304.6	-7419.6	-7203.6	-7203.6	-7203.6	-39794.8	-72353

Additional effort for the AP team in 25/26 of 1767 hours equivalent to 236 days / 11 months / 0.9 years, this increases in 26/27 by 165 hours then reduces by 216 hours in 27/28

Additional effort for the HR professional teams in 25/26 of 2424 hours equivalent to 323 days / 15 months / 1.26 years, this reduces by 50 hours in 26/27

Additional effort to support HR Helpdesk queries in 25/26 of 3113 hours equivalent to 415 days / 19 months / 1.62 years, this is expected to reduce in time

Fusion will automatically put invoices with a PO & Invoices that look similar on hold. **The AP Team** will spend more team actioning these to **ensure accuracy and compliance of the No PO No Pay process.**

Whole organisational improvements to move off system activity online and provide increased self service to Employees and Managers such as timecards, work schedules, submitting absences and more online approvals of leave, expenses / invoices etc mean that **the internal HR Team have increased responsibility to support and ensure accuracy & compliance** of these processes. It will also mean **increased enquiries to the helpdesk** to support additional self service activity.

There is a strong possibility that this additional centralised effort will reduce in time

Benefits by Functional Team

The table below shows the number of benefits identified by each Functional Team aligned to the Strategic Benefits & Priorities

Strategic Priority / Benefit	Finance	Grants	HR	ICT	Payroll	Proc	RMC	Support Model	Grand Total
Best practice processes	6	2	16	3	4	1			32
Process efficiency / productivity	6	2	15	3	4	1			31
Digital organisation (paper free)			1						1
Continuous improvement		1						1	2
Platform for innovation		1						1	2
Financial effectiveness	3		1	4	3	2			13
Savings	3		1	4	3	2			13
Informed decision-making	5	1	5		1	3			15
Informed decision-making / business intelligence	5	1	4		1	3			14
One source of the truth			1						1
Organisational Governance and Controls	4		1	4		3	1		13
Compliance / Risk Reduction	4		1	4		3	1		13
Service effectiveness	3	1	2	1					7
'One-Sandwell' – consistency of processes			1	1					2
Corporate Services move from transactional to strategic / assurance	3	1							4
Self-service, employee empowerment			1						1
Social value		1				1			2
Social value		1				1			2
User experience	2		2		1	1			6
Engaged workforce / employer brand			2		1				3
Reputation with Supply Chain	2					1			3
Grand Total	23	6	27	12	9	11	1	1	90



Programme Completion Report

Programme Deliverables

- A balanced resourcing model for the Programme ensured that the right skills sets were in place with experience and capabilities to support successful Programme Delivery.
- The Programme resources included:
 - Sandwell & SCT employees at different levels of authority,
 - Infosys – System Implementor (technical resource)
 - Civiteq – Programme delivery and Change expertise
 - External Consultants – Oracle Fusion experienced (functional & technical)
- Deliverables were agreed with third parties for each phase of the Programme:
 - A Statement of Works (SoW) was agreed at the outset of the Programme, which included the scope and deliverables expected of Infosys for the technical system implementation. This SoW was used throughout the Programme as part of Contract Management and delivery assurance.
 - Civiteq also agreed deliverables for the duration of the Programme and reported progress and risks against these deliverables on a monthly basis.



Statement of Works

Phase	Activities	Deliverables
Discovery	<ul style="list-style-type: none">Project Initiation – Identify all deliverables, responsibility matrix, milestones, risks, issues, and constraintsSystem AccessConduct Boot camp workshopsDemonstrate business processes to the client core teamStrategy Document PreparationDefine and agree acceptance criteria	<div>√ Project Management Plan</div> <div>√ Requirement Traceability Matrix</div> <div>√ Implementation Strategy Documents</div> <div>√ RAID log</div> <div>√ RACI</div> <div>√ Project Phase closure Entry and Exit criteria document sign-off</div>
Modelling (Design)	<ul style="list-style-type: none">Fit gap AnalysisSolution DesignConference Room Pilot (CRP)Confirm solution fit to required business processesConfiguration DefinitionUser Access and SecurityIntegration Prerequisite confirmationData Load preparation	<div>√ Fit Gap analysis document</div> <div>√ Business Process Specification</div> <div>√ Data Migration tracker (across entities)</div> <div>√ Design Documents for interfaces reports data migration</div> <div>√ Configuration Workbook (BR100)</div> <div>√ Project Phase closure Entry and Exit criteria document sign-off</div>
Realisation (Configuration, Integration, Data Migration, Testing & Training)	<ul style="list-style-type: none">Configuration SetupSolution extension development, reporting developmentInterface developmentUnit TestingSolution WalkthroughsData MigrationSystem Testing / System Integration TestingTraining-Train the TrainerUser Acceptance TestingCutover preparation	<div>√ CRP Completion</div> <div>√ Configuration Signoff</div> <div>√ Updated trackers</div> <div>√ Data Migration for SIT, UAT and PPR Runs completed</div> <div>√ Completion of Build of Interfaces and reports</div> <div>√ System Test / SIT Sign-off</div> <div>√ UAT Sign Off</div> <div>√ KUT Training – Plan, Material and User Guides</div> <div>√ Project Phase closure Entry and Exit criteria document sign-off</div>

Statement of Works

Phase	Activities	Deliverables
Deploy (Deployment)	<ul style="list-style-type: none">• Deploy configuration, setups, interfaces, and reports in Production• Post implementation verification• Key User training• Production Cutover• Handover to Support	<ul style="list-style-type: none">✓ Go-Live Checklist✓ Updated Data Migration Tracker✓ Defect tracker✓ Go-Live Entry and Exit criteria signed off
Hypercare (Support)	<ul style="list-style-type: none">• Knowledge transition and handover• Monitoring scheduled jobs, reports, integrations, and fixing defects proactively• Monitoring period close activities and Payroll Runs• Resolution of issues notified by Users• Establish a robust system governance structure• Takeover the support and maintenance activities with zero business disruption.• Structured root cause analysis and proactive measures for services optimization.• Schedule and deploy new releases and upgrades with the help of Oracle	<ul style="list-style-type: none">✓ Defect Tracker✓ RCA Report (for P1 incidents)✓ KPIs Dashboard✓ Learning and feedback✓ Project completion report✓ Project closure Entry and Exit criteria signoff

- Knowledge transfer activities will continue as part of the 3rd party support contract
- Transition to support and maintenance activities from 1st January 25
- Transition to new governance arrangements from 1st January 25
- Structure root cause analysis to continue as part of the new Support Model governance arrangements
- Knowledge transfer for new releases and upgrades to take place from Feb 25 release onwards



Civiteq Deliverables - Programme Management

Workstream	Deliverables Description	Deliverable	% complete (programme)	Comments
Programme documentation	Lead the development and maintenance of one single programme plan working with the Systems Implementer, building in all sub project activities Oversee the development and maintenance of key programme documentation via the Programme PMO to include documents such as RACI, RAIDD Log, Change Request Log, Governance Terms of Reference, Resource Management Schedule	Programme Plan Programme Documentation inc. RACI, RAIDD log, Change Log etc End of Project Report	98%	All documentation is in place and baselined Hypercare plan and carry over plan finalized End of Project report to be completed
Programme Leadership	Provide overarching programme management and leadership to the programme team Engage all relevant resources, stakeholders, and partners to secure the positive delivery of programme outcomes	Programme Leadership Stakeholder Management	100%	Ongoing throughout programme
Programme Governance	Maintain a robust Programme Governance Model, ensuring key processes, roles and responsibilities and meeting are undertaken Provide periodic (weekly/fortnightly/monthly as required) highlight reports and executive report packs for relevant governance boards Provide monthly highlight reports to cover progress against all deliverables stated within this proposal Oversee the identification, management and escalate risks, issues and dependencies and mitigation actions to relevant governing bodies and key stakeholders via the Programme PMO Ensure the delivery of all products and services are to the appropriate level of quality, within time and budget in accordance with the programme plan Oversee the management of any programme interdependencies and any required action that may need to be in place via the Programme PMO	Programme Governance Highlight Reports RAIDD Management Fusion Contract renewal Risk Management Implementation	100%	Governance and reporting model in place and working effectively New Oracle Fusion contract agreed Led through Grant Thornton Review Hypercare Exit Gateway complete
Budget Management	Support the management of the programme budget and expenditure on behalf of the SRO in an agreed format Provide monthly highlight reports against progress for sign off Provide a periodic budget expenditure report for all aspects of the programme tracked against the Final Business Case	Programme Budget Monitoring	100%	Ongoing throughout programme – support to Finance BP as required
Resource & Performance Management	Management of all programme resourcing ensuring capacity and capability is sufficient to meet the current and emerging requirements of the programme Ensure all programme resources are performance managed – reporting resourcing pressures and non-performance to relevant stakeholders for resolution Work with the PMO to maintain a fully costed resource schedule.	Resource Schedule Active management of resources across key activities, highlighting gaps and forward planning – frequent meetings with Leadership	98%	Resource plan in place Additional resources identified and approved Resources now being transitioned off programme

Workstream	Deliverables Description	Deliverable	% complete (programme)	Comments
Change Management and Leadership	Leadership of the Business Change Resources, ensuring all activities and outputs are tracked and delivered Creation of a business change plan, aligned to the Sandwell Business Change Strategy, that will support stakeholders through changes in ways of working and responsibilities Ongoing management and update of the business change plan integrated within the wider Programme/project plan.	Business Change Plan	100%	Ongoing delivery of plan until close of hypercare
Stakeholder Management	Engagement with stakeholders and stakeholder groups as defined in the Stakeholder Management Plan Engagement with wider organisation stakeholders, stakeholder groups and external bodies as defined in stakeholder management plan Support the delivery of Stakeholder communications and Engagement Strategy	Stakeholder Management Plan	100%	Ongoing delivery of plan until close of hypercare
Business Readiness & Change Agent Network	Define and agree Business Readiness approach and criteria including management and delivery of readiness assessments Initiate a Business Readiness Group or equivalent as determined to support pre, during and post implementation of wider organisation Define, mobilise, and manage the require change agent network(s) as defined in business change strategy Identify whether the business is ready for go-live of the Oracle Fusion system based on pre-agreed business readiness criteria	Business Readiness Approach	100%	Closure of change network and Business Readiness Group with close of hypercare Final BRG to take place in January
		Business Readiness Assessments	100%	
		Change Network definition, mobilisation, and management	100%	
Change Impacts and Interventions	Develop a role-based change impact assessment for all stakeholders, users, and operators with the Change Analysts. Understanding the impact on the current operating model of the service functions of the new ERP solution. (Oversight and delivery of the Finance and Procurement as per resource scope) Delivery of change management interventions based on the outcomes of the change readiness and change impact assessments such as engagement events, readiness activities	Change Impact Assessments	100%	Hypercare activities to review defects and new requirements for change impact and confirm relevant interventions

Civiteq Deliverables - Learning, Benefits, Solution Architecture, Testing

Workstream	Deliverables Description	Deliverable	% complete (programme)	Comments
Learning and Development	Produce a Learning needs analysis to understand the scope of learning across all stakeholder groups Create a Learning Strategy to enable users to adopt the new ERP Solution system and processes. Producing a recommended approach to learning and associated options to deliver upon that approach. Produce an options paper for the delivery of the training strategy for Steering Committee. Create a Learning Plan Oversee the development and implementation of the Learning programme Evaluate the effectiveness of the Learning Programme	Learning Needs Analysis Learning Strategy Learning Options Paper Learning Plan Learning Programme Closure Report	100% 100% 100% 100% 100% 100%	Learning delivered Maintenance of OGL continuing through hypercare as key change support intervention and will move into BAU maintenance activity as part of hypercare closing. Learning closure report complete.
Benefits Realisation	Develop a benefits realisation framework Identify Benefits Owners, facilitate the identification, baseline and tracking of benefits	Benefits Realisation Framework	40%	Approach agreed, high level benefits identified, non-critical path activity to finalise benefit ownership deferred to manage programme priorities Note Programme Board member direction to deprioritise progress on benefits work against other critical go-live activities
Solution Architecture Advice and Guidance	Provision of advice and guidance on solution design Attendance at the design authority to provide challenge and offer solutions Production of a Solution/Business Architecture Document Facilitate the tracking of requirements through design	Advice & Guidance Business Architecture document	100% 90%	Ongoing technical / functional support throughout Programme Document to be finalized with complete view of design decisions
Testing Strategy Development	Production of a Testing Management Strategy to include functional, integrations, reports	Testing Strategy	100%	Test strategy document completed and signed off.
UAT Testing Plan	Development of a Testing Plan, identifying key resources to undertake testing activities, planning the schedule	Testing Plan	100%	UAT plan complete for HCM, Finance and SCM but the plan is being reviewed so might change
Testing Execution Management	Project Management of the testing phases – oversight of delivery against plan, reporting on progress, managing any risks or issues. To include oversight of the development of testing scripts, set up of testing tools etc.	Testing Highlight and Insight Reports	100%	Test phases complete

Civiteq Deliverables - Support Model

Workstream	Deliverables Description	Deliverable	% complete (programme)	Comments
Support Model advice	Provision of advice and guidance on the design of the Support Target Operating Model – inc. design principles, lessons learned, functional models, costing etc	Advice & Guidance	100%	Support Model Options Appraisal complete & model developed. Third Party scope developed. Third party options appraisal developed (Budget assumptions in development, with DG). Ongoing workstream and resource plan complete.
Support model implementation	Planning/governance	Project plan, RAID log, governance	100%	Project plan, RAID log and monthly contract meetings/highlight report process in place.
	Stakeholder engagement/communications	Stakeholder map	100%	Map will be reviewed during process/customer journey development
		Stakeholder engagement/communications plan	100%	Complete
	Operating model design	Roles profiles	100%	Role profiles for all new roles in the new support team developed
		SMBC JDs/PSs/HR forms	100%	Complete
		RACI, process definitions	100%	RACI produced. Reviewing with project team, Infosys and new Support Team members.
		Support team implementation approach, interim support team structure	90%	Consultation complete. Roles for existing staff agreed. HR transfer dates to be confirmed. Head of Oracle Services pending SMBC management tiers review. Interim Oracle Project Lead confirmed. Plan for transition of remaining posts and knowledge transfer to be finalised. Interim Support Team structure proposed and agreed to mitigate delays.
		Incident support tools decision	100%	House on the Hill configured, implemented and in use.
		Learning needs analysis, learning development plan	100%	Complete for confirmed roles
	Customer journeys	Customer journey maps / workflows	100%	Complete
	Post Go-Live Support	Resolver groups	100%	Resolver Groups in place
	Third-party Support	Scope and detailed requirements	100%	Contract in place.
		Purchasing decision	100%	Contract in place.

Civiteq deliverables summary

- Programme Deliverables 100% complete – note involvement in Budget Monitoring varied throughout project delivery
- OD & Change Deliverables 100% complete – note final Business Readiness Group to take place in Jan 25
- Learning & Development Deliverables 100% complete
- Benefits Realisation Deliverables 40% complete – further work to define & baseline benefits to take place in Q1 25
- Solution Architecture Deliverables 100% complete
- Testing Deliverables 100% complete
- Support Model Deliverables – complete for confirmed roles / interim structure proposed and approved whilst ongoing recruitment to permanent structure takes place



Programme Completion Report

Programme Closure

- At the end of each phase, Programme Gateways were carried out with the Programme Board, where evidence was presented that the agreed Phase Exit Criteria had been met. The Programme Board would then vote and confirm whether the Programme is able to proceed to the next Phase.
- At Programme Closure, Programme Board follow the same process and consider the evidence as to whether the Programme is ready to formally close and transition into Business as Usual with the Support Team in place to manage outstanding Programme work and new queries, issues and changes via a ticketed process.
- On 13th December 2024, Programme Board gave formal approval to close the Oracle Fusion Hypercare Phase on 31st December 2024 and enter into business as usual Support arrangements.
- Extracts from the Programme Board decision pack are included in the following slides.



Hypercare headlines

- **Oracle Fusion went live** from 1st October 2024 for **10,163** users including professionals, managers, employees of SMBC, SCT and all schools. To date 8028 users (91%) have logged in. 1,300 users are not expected to as either hard to reach, election staff or volunteers.
- **Oracle Fusion help hub** – Programme team presence in office for early days of hypercare with experts able to action any initial key issues and resolve at first point of contact.
- **Key Processes**
 - **Payroll** – All payrolls have been run successfully. Payslips are available to download as part of employee self service.
 - **Finance** – Finance month end process has completed for two month ends.
 - **Procurement** – Suppliers are paid following the automated process regularly and with the correct payment methods.
 - **Bank reconciliation** – now running online and more effectively with key parts automated (instead of spreadsheet based)
 - **Expenses process** – automated and online
 - **Transfer of data via 3rd party systems in a safe and secure way** – BACs, DSI, bank files, Firmstep, EDMS

To continue post Hypercare –

- **Design and Implementation of Risk Management Controls** – safe and secure roles and data access across Fusion
- **Design and Implementation of Oracle Archiving** – to ensure all SBS records are available when it closes in December
- **Budget Monitoring** process design and implementation



Hypercare (Post go-live) incident dashboard

Status as of 08:00 Thursday 12th December 2024

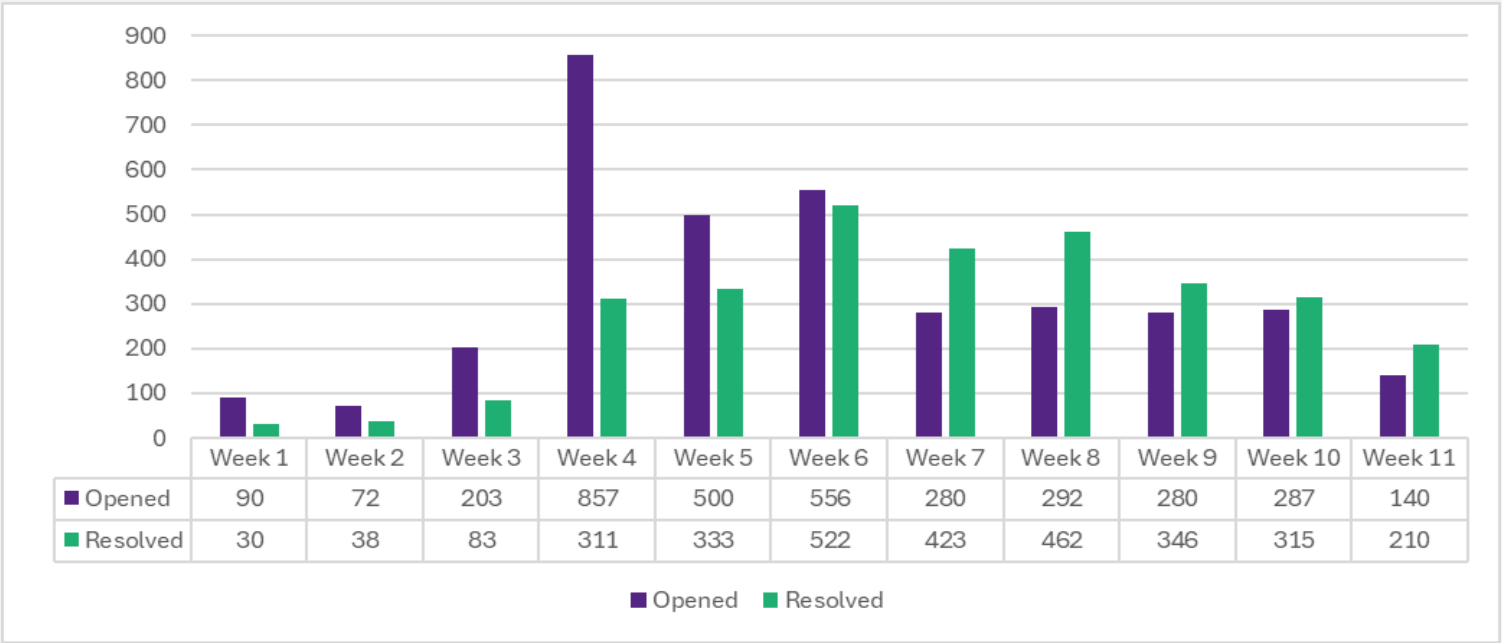
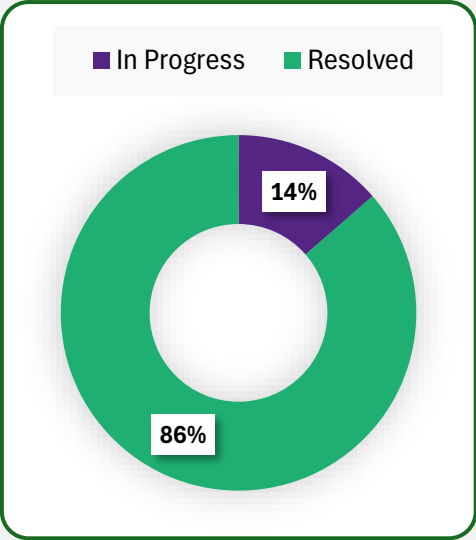
TOTAL

3557

REPORTED INCIDENTS

INCIDENTS PER WEEK

4 Oct	90
11 Oct	72
18 Oct	203
25 Oct	857
1 Nov	500
8 Nov	556
15 Nov	280
22 Nov	292
29 Nov	280
6 Dec	287
13 Dec	140
20 Dec	



INCIDENT TYPE

LOGIN



709

Incidents relating to logging in, including missing desktop icon, SSO errors and access via non-corporate devices

'HOW TO'



122

Incidents where user is seeking guidance to perform tasks, and where re-sharing of learning materials, comms or SME support is required

ROLE/ACCESS



502

Incidents relating to a user's role access and their access to relevant data (mainly related to absence management and purchasing approvals)

TECHNICAL ISSUES



688

Incidents where there appear to be system errors or other technical faults that require L2/L3 support investigation (which may generate Change Requests)

OTHER



1536

e.g. data breach, learning and development, reporting, setup, interface, configuration, notification and workflow issues

OPEN INCIDENTS

Tier 1	11
Tier 2	472
Tier 3	1

Open Oracle SRs

CLOSED INCIDENTS

Tier 1	192
Tier 2	2873
Tier 3	8

Hypercare exit criteria status 27/11 (1 of 4)

	Criterion	Target	Current Status Summary Finance and Procurement	Current Status Summary HR & Payroll
Processes				
	Month end activities are operationally acceptable	Yes	Month end processes have run effectively for October, month end period close was completed. Finance issues to resolve: Payroll to GL issue resolution Capital – detailed projects monitoring report and upskilling approach agreed Budget Monitoring forecasting to budget change, data clean up for hierarchies and cost centres AR – Plan to resolve around 25 outstanding issues to be agreed.	
	All payrolls running correctly from an operations perspective	Yes		Payrolls are running correctly and paying people accurately. Outstanding resolution of reconciliation of payroll accuracy - post hypercare All payslip issues are now resolved
	Payment processes are working effectively.	Yes	Payment processes are working effectively Supplier payment methods have now been corrected where there were gaps Approval issues need to be resolved (SCT / Capital) (CR's in progress)	
	Handover to SMBC resources/Third-Party Support, as agreed (plan will be agreed during hypercare)	>90%	Support Model: 9 internal posts agreed, remaining recruitment will not conclude until April – Jun 25. Support Contract in place. Interim Resource structure to be approved. Handover plan in development. Expert users nominated for functional teams – knowledge transfer to happen in Jan. Gap in AR	Expert Users nominated

Hypercare exit criteria status 27/11 (2 of 4)

	Criterion	Target	Current Status Summary Finance and Procurement	Current Status Summary HR & Payroll
	Change requests			
	Any critical change requests ¹ have been prioritised, impact assessed and closed, with any known exceptions listed and actions agreed for handover to BAU support/Third Party Support contracts.	Yes	<p>Exceptions –</p> <p>OF002398 - SMBC_OF_CR052 Dunning Vs Dispute Management Report (raised on 12/11 – tbd ASAP – likely post Hypercare)</p> <p>OF002400 - SMBC_OF_CR051 Email Maintenance (raised on 12/11 – tbd ASAP – likely post Hypercare)</p> <p>CR055 SCT Approval Structure BTDA 12/12</p> <p>CR due for changes to Payroll Schools Report</p>	<p>Exceptions –</p> <p>OF000355/ OF001475/ OF001488/OF001527/OF001562 - CR - Recruitment enhancements: External applications - CR being actively discussed, will take priority in Hypercare – approved and ETA 24/12</p> <p>OF002382 - CR - Implicit flexi time changes – CR being actively discussed, will take priority in Hypercare – BTDA 12/12 – ETA TBC</p> <p>OF001502 - Timecard Overrides – proposed to take next priority (post Hypercare) BTDA 17/12 – ETA TBC</p> <p>15819 - BTDA CR - No bell icon received when case reassigned) - proposed to take next priority (post Hypercare)</p> <p>OF002420 Talent Annual review - CR to be finalized – to be given priority in January</p> <p>OF000897 - CR - Probation Notification Report – Post Hypercare</p> <p>CR - Careers website changes – to be progressed internally</p> <p>OF002460 HR data validation / updates – to be reviewed</p> <p>OF016034 Paternity leave error message (CR tbc)</p>
	Workarounds reduced where possible and on-going workarounds are tested, documented and agreed by business owner for Oracle SRs	Yes	<p>Finance – minimal level of workarounds</p> <p>Procurement workarounds in place for approvals</p> <p>1 workaround exists related for an Oracle SR which is in progress – Senior level approvals</p>	<p>HoTH Workarounds forecast to be open post 20/12 – 39 confirmed – further review on last 2 weeks data to take place</p> <p>OF003000, OF003075: related to Oracle SR 4-0000166021 – related to timecard repeat notifications: user impacting but no workaround</p>

Hypercare exit criteria status 27/11 (3 of 4)

Criterion		Target	Current Status Summary Finance and Procurement	Current Status Summary HR & Payroll																									
Incidents																													
Level of incidents being raised in 3 rd month is close to the number of incidents planned for in the Third-Party Support Contract		Yes	Sow for Support target info: Tier 2 = 100 per month / Tier 3 = 80 per month / Minor enhancements = 160 hours of effort per month Actual = approx. 93 tickets over last 2 weeks that would require Infosys input through tiers. Additional Infosys effort and support around user guidance covering for SME absence, not expected to impact through Support desk. Fixes to OTL will reduce a number of tickets being raised.																										
Any severity 1 and 2 incidents are closed, with any known exceptions listed and actions agreed for handover to BAU support/Third Party Support contracts. <table border="1"> <thead> <tr> <th>Priority/ severity¹</th><th>Definition</th><th>Response time (hours)²</th><th>Resolution time (hours)³</th><th>Target adherence level %</th></tr> </thead> <tbody> <tr> <td>1 - Critical</td><td>A production application issue that impacts all users in a business unit, site and/or department. No workaround available.</td><td>1</td><td>4</td><td>95</td></tr> <tr> <td>2 - High</td><td>The issue impacts a high number of users limited to a business unit. No workaround available.</td><td>4</td><td>16</td><td>95</td></tr> <tr> <td>3 - Medium</td><td>The issue only impacts a few users, and a workaround is available to perform the business functions.</td><td>8</td><td>32</td><td>90</td></tr> <tr> <td>4 - Low</td><td>The issue has minimal impact and no impact for the execution of business functions.</td><td>40</td><td>96</td><td>90</td></tr> </tbody> </table>		Priority/ severity ¹	Definition	Response time (hours) ²	Resolution time (hours) ³	Target adherence level %	1 - Critical	A production application issue that impacts all users in a business unit, site and/or department. No workaround available.	1	4	95	2 - High	The issue impacts a high number of users limited to a business unit. No workaround available.	4	16	95	3 - Medium	The issue only impacts a few users, and a workaround is available to perform the business functions.	8	32	90	4 - Low	The issue has minimal impact and no impact for the execution of business functions.	40	96	90	Yes	There are no severity 1 and 2 incidents SMEs have prioritised remaining incidents from Critical to Low Target to resolve all Critical and High incidents baselined at 20/11 during Hypercare. 14 reduced to 12 (9 complete) Medium tickets to be picked up as next priority. Target to close all Spira Incidents – 2 Exceptions – Med and Low HotH tickets will carry over for delivery post hypercare. High no of med and low incidents are service desk responsibility	There are no severity 1 and 2 incidents SMEs have prioritised remaining incidents from Critical to Low Target to resolve all Critical and High incidents baselined at 20/11 during Hypercare – 146 reduced to 100 (91 complete / 9 ETA 20/12) Target to close all Spira Incidents – 27 Exceptions – Remaining HotH tickets will carry over for delivery post Hypercare. Of the 183 tickets there are 87 problems which will require resolution post Hypercare.
Priority/ severity ¹	Definition	Response time (hours) ²	Resolution time (hours) ³	Target adherence level %																									
1 - Critical	A production application issue that impacts all users in a business unit, site and/or department. No workaround available.	1	4	95																									
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4 - Low	The issue has minimal impact and no impact for the execution of business functions.	40	96	90																									
The number of “How to” queries is declining for professional users (monitor across the hypercare period)		Yes	AR & Collections still consistent flow. GL, Expenses, Cash Mgmt slowing AP, Simplified Loader (invoice raising) and Requisitioner queries still high – they have declined but still many queries from professional users	Payroll – slowing – reduced ask from BAU HR – How to queries have settled significantly since go-live, with the exception of T&L and Core HR. T&L – User experience challenges and further change required to design – CR identified to address Core HR – high no of incidents that need to be retested and closed																									

Hypercare exit criteria status 27/11 (4 of 4)

	Criterion	Target	Current Status Summary
User experience			
	Pulse check survey with professional users showing positive improvement (survey in October, November and December)	TBC	Wider Programme team comms to be sent out thanking team for all their efforts and seeking feedback with 3 key questions on 16/12
	Those who need to login, can login (measured by number of login issue incidents)		8,028 users have accessed Oracle Fusion of 10,163 1000 + will not access the system as these are hard to reach, elections staff,
	Data Migration has completed as planned and any post-migration incidents have been resolved.	Yes	2 DM incidents open / 1 at retest
	Data cleansing completed in line with agreed plan.	Yes	All planned data cleansing is complete
New	Reports are delivered as per priorities, targets dates agreed for delivery of any outstanding reports post hypercare	Yes	HCM: Target 16 to be completed - 6 complete / 7 of 10 planned / 44 post Hypercare Fin & Proc: Target 15 to be completed – 1 complete / 5 post Hypercare (ETAs to be confirmed)
	Oracle integrations are operational as per agreed plan.	Yes	31 of 33 integrations are operational as per plan 2 (AD integrations) are being tested
Governance			
	Agreed governance processes in place	Yes	Post Hypercare Governance approved and being mobilised

Hypercare Exit Status 18/12/24

Activity type	How this work will be delivered	Carry over status
Spira Incidents	Will be actioned in Jan	22 of 191 remaining
House on the Hill Incidents	Carry over will be delivered by the Support Model process – PMO will review prioritisation	HCM – 183 tickets Fin & Proc – 105 tickets Reports – 7 tickets Technical – 67 tickets
BTDA Change Requests	Funding and separate resource approved via governance to deliver these via priority	HCM: 6 – 1 to be completed / 5 to be delivered post Hypercare Fin: 2 – 2 post Hypercare (3 new in last 2 days)
Outstanding Reports from SoW	Infosys to deliver without additional cost – priorities and joint plan to be agreed	HCM - 44 post Hypercare Fin & Proc 5 post Hypercare
Other plan items – Abstract roles, Audit tracking, Audit roles	To be assessed and planned out of available support hours	To be planned via priority in January
Risk Management Cloud EPM Capital Budget Monitoring	Separate workstream and resources	Both planning to deliver in January

SoW for Support agreed 3rd Party resource:

Tier 2 = 100 tickets per month / Tier 3 = 80 tickets per month

Minor enhancements = 160 hours of effort per month



Programme Completion Report

Lessons Learned Summary

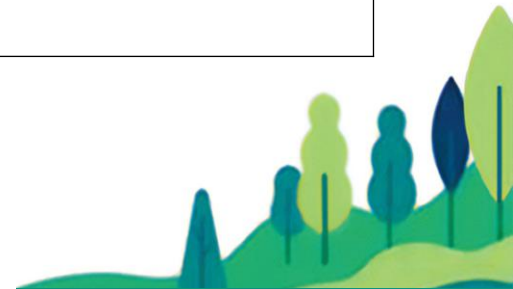
- Applying a lessons learned and continuous improvement approach to Programme delivery enables us to learn from experience, manage risk, drive positive change, and build foundations for ongoing success and innovation
- Lessons Learned workshops were completed at various stages of the Programme.
- A final Lessons Learned was carried out at Go-live with different Programme Stakeholders including the Programme Board. A Lessons Log has brought together the recommendations into a set of actions with owners agreed.
- The Lessons Learned Log will be referred to the Corporate Transformation Board, the Board will be responsible for ensuring that actions are implemented.
- It is anticipated that the Lessons Log will support improvements to Programme, Change and Transformation delivery at Sandwell.



Lesson topics

A lessons learned exercise was carried out with the SMBC Programme Board Sponsors which covered the below areas. The next slides summarise the key lessons captured.

Topic	Prompt
Strategic planning	Links with other programmes, benefits
Oversight, governance and reporting	Budgetary, decision making, reporting, right stakeholders
Ways of working throughout programme	SME level, leadership level, design, ability to sponsor, changeover
Design and solution that has been delivered	Current delivery, forward plan
Procurement	SI, Civiteq , Oracle and licensing
Resource planning and management	SMEs, backfilling, use of non-council resources
Change support for wider stakeholders	Communication, engagement, learning



The Lessons Learned Log will be referred to the Corporate Transformation Board, the Board will be responsible for ensuring that actions are implemented.

Lessons Log

Turning recommendations into action

Ref:	Date Raised	Status	Assigned to	Topic	Reflection	Action
1	03/10/2024	Open	Alex Thompson	Strategic Planning	Visible opportunities to build on Oracle functionality to optimise and enhance benefits / continue to review wider organisational strategic needs.	Development of a phase 2 Business Case aligned to Council Strategy, opportunities to maximise benefits and underpin future transformation activity with Oracle Fusion.
2	03/10/2024	Open	Alex Thompson	Strategic Planning	Challenges in dovetailing into wider strategy	Develop the Councils Transformation Roadmap which brings together all key Programme activity and ensures alignment of outcomes to deliver the strategic ambition.
3	03/10/2024	Open	Vicki Merrick	Oversight, governance and reporting	The Programmes Governance, controls and reporting process was successful and received positive feedback from the Programme Board.	Reuse Governance Structures, Reporting methods and controls templates. Ensure future Governance Boards include representation from all parties to ensure balanced decision making.
4	03/10/2024	Open	Claire Spencer	Oversight, governance and reporting	Changing direction on internal budgeting process, improved budget visibility	Future programmes to have Programme Manager budget ownership & ensure consistency in internal budget financial treatment
5	03/10/2024	Open	Vicki Merrick	Ways of working	Middle Management layer addition in the HR workstream resulted in improved delivery	Ensure Management level ownership and direction for future programmes
6	03/10/2024	Open	Vicki Merrick	Ways of working	Programme Board owning readiness reviews meant risks and concerns managed proactively and good level of ownership from functional areas	Future programme governance to ensure ownership and updates carried out by Board members for respective areas
7	03/10/2024	Open	Vicki Merrick	Ways of working	Silo working and lack of insight into design led to some late understanding of proposed solution and resulted in changes to align with board owners operational vision	Shared Board level ownership to be agreed from the outset. It is critical that Board members understand design decisions that are made and participate in Phase Gateways.
8	03/10/2024	Open	Vicki Merrick	Current delivery, forward plan	Following Design Principles, 'adopt not adapt' has avoided issues seen in other implementations	Plan design principles for other programmes based on relevant best practice and ensure they are adhered to through project governance
9	03/10/2024	Open	Vicki Merrick	Current delivery, forward plan	Some modules bought without clear operational ambition for use e.g. Contract Management	Ensure internal focus and alignment on vision before procurement activity. Also if Leadership changes take place, ensure vision is carried forward with transition.

The Lessons Learned Log will be referred to the Corporate Transformation Board, the Board will be responsible for ensuring that actions are implemented.

Lessons Log

Turning recommendations into action

Ref:	Date Raised	Status	Assigned to	Topic	Reflection	Action
10	03/10/2024	Open	Vicki Merrick	Resource planning and management	Challenges in resourcing backfilled posts impacted availability of assigned SMEs	Ensure backfilling actions are reported at the Programme Board and are complete
11	03/10/2024	Open	Vicki Merrick	Resource planning and management	Ongoing challenges relying on certain SMEs even after challenges identified, including morale impact from previous implementation	Address who is allocated to work as issues identified Address single points of knowledge within BAU resourcing
12	03/10/2024	Open	Vicki Merrick	Resource planning and management	Continuous pulls of BAU work on project SMEs across all workteams	Ensure full time allocations to project and backfill in place Ensure resources are sufficiently planned for the scope of work being delivered
13	03/10/2024	Open	Vicki Merrick / John Critch	Change support for wider stakeholders	System demonstrations held to manage concerns, these were heavily attended by workforce	Re-use approach for future ICT projects
14	03/10/2024	Open	Nicki Gobran	Change support for wider stakeholders	Regular school engagement managed a potentially challenging relationship	Re-use approach for future school engagement requirements e.g. SLA reviews
15	03/10/2024	Open	Omer Zaman	Change support for wider stakeholders	Positive feedback on quality of training material.	Retain and update materials to keep a consistent 'how to' guide for managing your processes in future
16	03/10/2024	Open	Matthew Moore	Change support for wider stakeholders	SMBC, SCT and programme communications teams' alignment provided opportunities for greater reach	Ensure strong strategic link between central communications teams and future programmes' communications resources
17	03/10/2024	Open	Vicki Merrick	Change support for wider stakeholders	Scope of some training material limited due to access to SMEs to develop the material or late decisions about design and process	Consider timing of decision making alongside resourcing plans for future programmes
18	03/10/2024	Open	Vicki Merrick	Change support for wider stakeholders	Trainers' opportunity to support embedding limited by overscheduling	Focus on who should attend what training and why

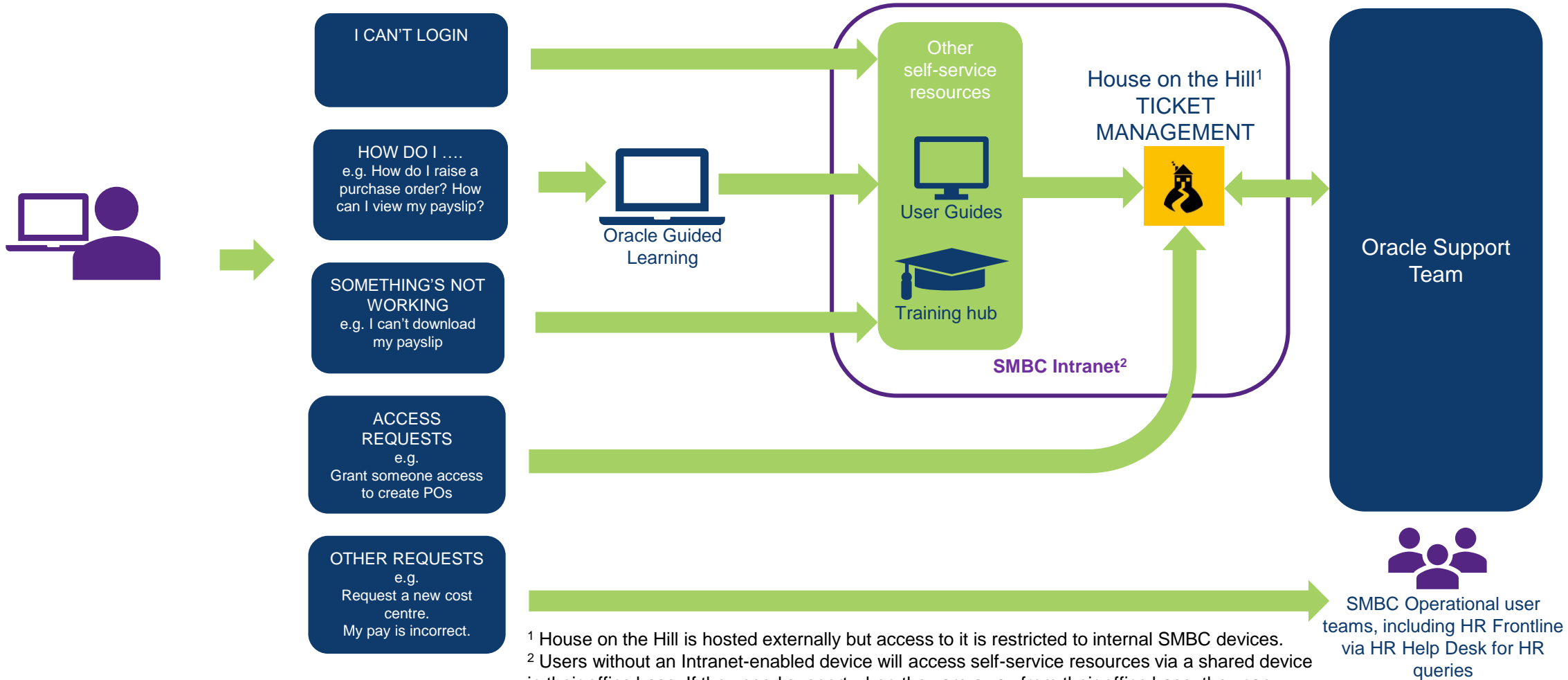
Programme Completion Report

Oracle Fusion Support Model

- Following the Programme Closure, there is a transition to business as usual working with Oracle Fusion and the Support Team
- An internal Support Team structure is now established along with third party support from Infosys for more Technical and complex issues. There are also arrangements with Oracle where Service Requests can be raised for issues that cannot be resolved with the support arrangements in place.
- All future issues will now be raised via a ticketed process and responded to by the Support Team.
- The Support Team are also responsible for horizon scanning, to ensure continuous improvement and benefits of the system are maximized by assessing and implementing new technology Oracle passes through quarterly releases and supporting effective adoption of this within Sandwell.
- The system is live and operating effectively for Sandwell's critical business processes. The next step is to stabilize, implement outstanding changes that have been identified, release workarounds and measure benefits. Then Sandwell will have a stable platform to enable future organizational transformation and maximise productivity and benefits.
- Remember 'Go-live is just the beginning'



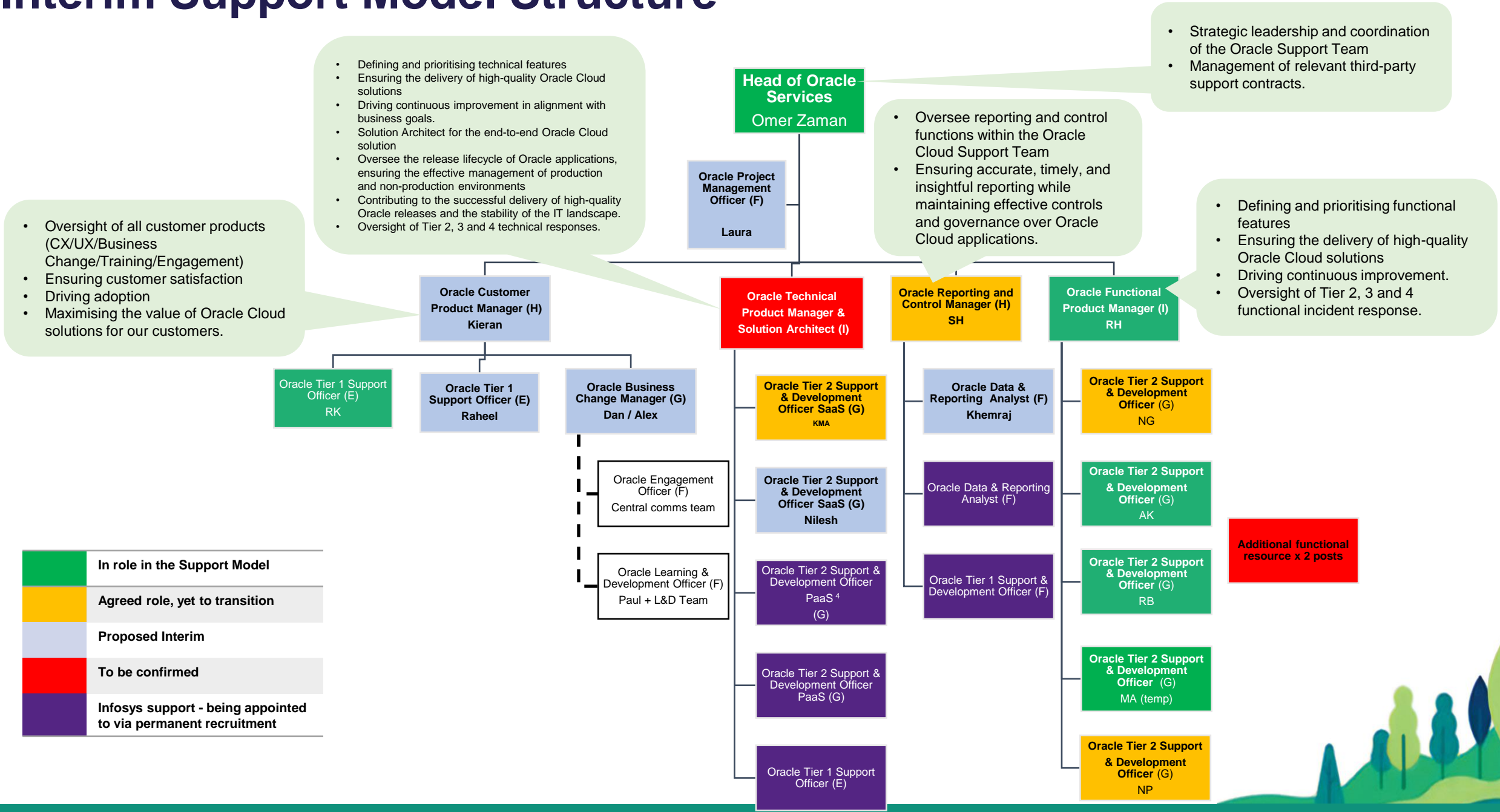
Customer support



¹ House on the Hill is hosted externally but access to it is restricted to internal SMBC devices.

² Users without an Intranet-enabled device will access self-service resources via a shared device in their office base. If they need support when they are away from their office base, they can email fusion_support@sandwell.gov.uk

Interim Support Model Structure



Governance Boards and Purpose

Board	Purpose	Membership
Oracle Steering Group Frequency: Monthly	<ul style="list-style-type: none"> Strategic steer – ensuring design and decision making is aligned with corporate strategy Financial decision making for Major Changes >£20K Review overall Oracle Fusion Status. (Incidents, Changes, quarterly updates and Project Delivery) Oversight of Oracle 3rd Party delivery status and any other 3rd party contracts Resource decision making Escalation point for risks and issues. 	<ul style="list-style-type: none"> Executive Director of Finance and Transformation (Chair) Head Of Oracles Services (Support Model) – Assistant Chair Corporate Transformation Manager (End User) Assistant Director for HR & OD (HR & Payroll) Assistant Director for Finance (Finance) Interim Head of Procurement (Procurement) Assistant Director of ICT (ICT) Audit Services Manager (Audit / Risk) Assistant Director Legal & Assurance (Legal / MO)
Business & Technical Design Authority (BTDA) Frequency: Monthly (to be cancelled if not required)	Scope: Changes >2 days effort (Tier3) up to £20K <ul style="list-style-type: none"> Review requests for new requirements or changes to existing design Ensure new changes are in line with Design principles and system architecture Ensure changes are inline with Oracle Strategy and value for money Ensure change have an agreed budget and timeline Review risks and consequences of proposed changes Review and approve impact assessment for quarterly releases where required – for major changes 	<ul style="list-style-type: none"> Head Of Oracles Services (Support Model) – Chair Oracle Project Manager Oracle Technical Product Manager Ian Dunn, Anthony Wright, Rikesh Patel Andy Jukes, Neil Whitehouse Nicki Gobran, Vivek Krishnakumar James Trickett, James Turner
Incident Review Group Frequency: Weekly (to be cancelled if not required)	<ul style="list-style-type: none"> Oversight of incident management Problem Management Review of trends and problems Prioritisation of effort Review of delivery plan Weekly incident status reporting 	<ul style="list-style-type: none"> Oracle Customer Product Manager - Chair Oracle Project Manager Oracle Functional Product Manager Oracle Technical Product Manager Functional Expert users as required
Management Stand ups¹ Frequency: Weekly	<ul style="list-style-type: none"> Management oversight of outstanding project work Resourcing decisions Review of incidents and priorities 	<ul style="list-style-type: none"> Existing Membership

¹ HCM Management stand up and Finance & Procurement management standup. The need for these is to be reviewed once post-Hypercare carried forward activities have been completed.

From foundations to innovation

Using your new ERP system as a platform for further transformation and innovation

