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## Policy & Finance Committee

**Date:** 26 September 2022

**Title:** Software review

**Purpose of the Report:**

To update Committee on a recent software review and to consider recommendations.

**Contact Officer:**

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<b>Corporate Objective/s</b>	LLTC Five Year Plan – Objectives: 1: To regularly review how we communicate and seek to embrace new technologies. 2: To continue to aim towards a paperless office. 3: To review financial systems.	
<b>Implications:</b>		
<b>Financial</b>	No	Two changes recommended, within existing budget. Meeting software is the subject of a separate report.
<b>Human Resources</b>	No	
<b>Operational/Service delivery</b>	Yes	To ensure the council can operate effectively, including facilitating flexible/remote/hybrid working practices.
<b>Procedural/Legal</b>	No	LGA 1972 s111
<b>Risk/Health and Safety</b>	No	
<b>Environmental Aims</b>	Yes	To reduce printing.

### 1 RECOMMENDATION/S

Should the Committee be minded, the proposals are:

- 1.1 To note the review findings in the report and to support changes in software for surveys, electronic marketing and (in future) risk management, with costs to be met within the existing I.T. budget.

## **2 BACKGROUND**

- 2.1 Of the Council's annual I.T. budget of just under £30,000, just over half is currently allocated to software licences.
- 2.2 As set out in the Committee work plan for 2022-23, officers commenced work on a whole-Council software review in Spring 2022. The use of Microsoft Office 365 was excluded from the review as there is no intention to change this.
- 2.2 Following an inventory of all current software programmes, a survey form was sent out to all staff for completion for the products which they use. Employees were asked for feedback on ease of use, features, level of confidence in using the software, training needs and overall satisfaction with functionality.
- 2.3 Feedback was received on a number of software programmes used for the following purposes:
- HR functions (payslips, P60s, holiday, sickness absence)
  - Meetings management
  - Mapping
  - Electronic signage
  - Town Council apps
  - Finance
  - Allotments
  - Cemeteries
  - Bookings
  - Asset management
  - Risk management
  - Design
  - Social media scheduling
  - Surveys
  - Marketing mailings and forms
- 2.4 Staff were also asked if they were aware of any alternative software products or if there was specific functionality not possible with existing software programmes.
- 2.5 Following assessment of the responses, research was undertaken into both existing software (planned developments, potential add-ons or additional training options) and possible alternatives, particularly in respect of communications and meetings.

### **3 FINDINGS**

3.1 In most cases, the conclusion reached has been to retain existing software for reasons including:

- Familiarity with existing product and previous investment into training
- Alternative products were more expensive and/or offered no clear advantage
- Supplier relationship (for example, the HR software is a free addition to the payroll service)
- Synergy between applications means a change, even for improved functionality, would result in additional workload. Most notably this applies to the RBS software used for bookings, allotments and cemeteries, which synchronises with the finance software used for invoicing and payments.

3.2 Changes in software have been recommended in the following areas:

- Surveys
- Sign-up forms and email marketing
- Risk management
- Meetings management (see section 4)

3.3 Adding new software was also given consideration in the review. Particular consideration was given to the possibility of customer relationship management (CRM) software as a means to track multiple contacts with the same person across the organisation. Some initial research was undertaken into options but has been discounted (at present) for the following reasons:

- Most contacts relate to a specific service area and would be logged in the relevant software for that function
- The volume of “general” contacts probably does not warrant the investment in time and training
- Data protection requires that personal data is only kept “only as long as is appropriate and relevant for the specific purpose”

That said, should an appropriate product become available in future, this is something we may wish to pursue.

3.4 An alternative risk management software has been identified and costs (£1500/year) could be met within the existing I.T. budget. However, officers are aware of another product under development which may be more council-specific and therefore recommend waiting until 2023 to change packages.

### **4. MEETING MANAGEMENT**

4.1 In 2017, the Town Council adopted Modern.gov meetings management software as a means of progressing its aspiration towards paperless

meetings, for reasons of increased efficiency as well as environmental considerations.

- 4.2 At the time, a range of options were considered and the decision made to adopt Modern.gov due to its functionality, security features and the fact that it was also being used by the local authority.
- 4.3 An initial 12-month review and subsequent reviews demonstrated that the cost of the annual Modern.gov licence was being met through savings in consumables (paper, envelopes, printing & postage) as well as significant efficiencies in staff time when compared with the printing and collating of up to 25 agendas per week.
- 4.4 Since 2017, advances in technology and circumstances such as the Covid pandemic have resulted in the move towards digital and hybrid meetings as an accepted norm. There have also been advances made in meetings management software or “board portals”.
- 4.5 In 2021, the Town Council passed a resolution in respect of the world-wide climate emergency with a commitment to progressing towards becoming net carbon neutral. This along with objective #2 in its Five Year Plan 2019-2024 underpins the Council’s position in respect of paperless meetings.
- 4.6 In light of the above as well as a new Council term from May 2023, four options have been reviewed for future meetings management. A comparison summary is attached for information.
- 4.7 Officers have met with representatives of all four providers to receive a demonstration of the software and in all four cases, to try using the administration portal.
- 4.8 Feedback was sought from current councillors on the current software and the results of this, as well as the findings of the officer review, were discussed by a small focus group including six councillors in August 2022.
- 4.9 A full report with recommendations can be found as a separate item on this agenda for Committee consideration.

## **5. IMPLICATIONS**

- 5.1 The recommended software changes relating to surveys, email marketing and risk management software can be met within the existing IT budget.
- 5.2 Changes in surveys and e-marketing do not require significant officer time to process.

- 5.3 Any future change in risk management software will require some significant officer time in the first year of usage, but should improve efficiencies thereafter.
- 5.4 Implications regarding any software change for meetings software are identified in a separate report.

## **6. CONCLUSIONS**

- 6.1 The software has been a significant undertaking and although current recommendations are to retain most existing software for the reasons set out at paragraph 3.1, this has been a useful exercise which has highlighted some improvements which could be made in future. The review has also identified products under development which may become more appropriate in future.

**End.**