

# Croydon Council

# Oracle Improvement Programme

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## Purpose of the Report




To provide members with:

- An update on the Oracle Improvement Programme

# Background

- My Resources is the Croydon Council Enterprise Resource Planning (ERP) application running on the Oracle Cloud Fusion platform.
- It is used for Finance, Procurement, HR and Payroll and is a market leading product.
- The system has been live since May 2019 and is in a stable state.
- There is a perception within some parts of the Council that My Resources can be a blocker to improvements in the way the organisation operates.
- During April and May this year the Finance and HR systems Steering Group, an officer board, chaired by Corporate Director of Resources (S151 Officer) commissioned Oracle to undertake a review of the My Resources system to understand where improvements can be made to align the system with Oracle best-practice and ensure the Council maximises the benefits it can achieve from its investment.
- The review involved over 70 key stakeholders across the council with 12 workshops held.

# Oracle Review Findings

Area	Key Findings	Oracle Review Maturity Assessment – current <span style="color: red;">●</span> target <span style="color: green;">●</span>				
		Stage 1 Marginal	Stage 2 Stable	Stage 3 Best Practice	Stage 4 Transformational	
HR	Several off-system activities and functionality gaps with consequent human-intensive effort.	<span style="color: red;">●</span>			<span style="color: green;">●</span>	
Finance	Establishment data sync issues and a lack of automation in collections.		<span style="color: red;">●</span>			<span style="color: green;">●</span>
Procurement	Supplier set up and user compliance.		<span style="color: red;">●</span>			<span style="color: green;">●</span>

# Known Business Problems

- Inaccurate establishment data
- Compliance issues with self-service processes
- Poor absence records
- Usability of the system to monitor budgets
- Lack of My Resources skills and competence across the organisation
- Effort required of Finance to produce monthly financial reporting
- Poor engagement from managers and staff across the organisation

These problems are creating a vicious circle that we need to break out of....

# Known Problems with the governance, development and adoption of Oracle

- Ownership and usability of business processes
- Lack of strategic governance of My Resources
- Not exploiting the full potential of Oracle
- Lack of awareness of the capabilities of the system
- Oracle licences
- My Resources support model

## Work done

- Re-established governance – Finance and HR Systems Steering Group
- Confirmed that replacing Oracle is not a cost effective option
- Undertook a “Value Assessment” in conjunction with Oracle and Mastek to review our implementation
- Confirmed priority areas for improvement
- Developed a bid which was approved at the September Cabinet meeting to fund a six-month scoping and planning project to develop a fully costed detailed plan for a two-year Oracle Improvement Programme

## What we are doing now

- Building the programme team
- Engaging with staff who manage processes and use the system
- Arranging “Art of the Possible” sessions to confirm solutions

# Provisional Priorities

- Oracle conclude that it should be realistic to aim for a **best practice** level of maturity.
- They identified illustrative, best practice process changes, ranging from quick wins using reporting and functionality already in place to utilising functionality we have available but not deployed or where we have potential configuration/process design issues.
- The officer board has agreed to move forward with developing **ten key projects** grouped into three workstreams to address the Oracle report findings.
- The projects are listed the table on the next slide in a provisional priority order.
- There will be dependencies between processes which will need to be picked up as part of the detailed planning e.g.
  - Recruitment and Establishment processes need to be aligned,
  - Planning and Budgeting will need to align with changes to the establishment process.
- A consistent theme across all processes will be improving **governance, accountability, control, and transparency** and will involve a **significant culture change** across all business users.



# Ten Key Projects

Priority	Project	Benefit Expected	Workstream
1	Establishment - including starters movers and leavers	<ul style="list-style-type: none"> <li>Self-service automation and easy navigation</li> <li>Accurate timely reporting</li> <li>Reduce failure demand, and repetitive requests.</li> <li>Budget and establishment always reconciled.</li> <li>Avoidance of payroll errors</li> </ul>	HR
2	Planning & budgeting	<ul style="list-style-type: none"> <li>Self-service automation and easy navigation</li> <li>Accurate timely reporting and transaction drill-down</li> <li>Narrative reporting captured in Oracle</li> </ul>	Finance
3	Recruitment	<ul style="list-style-type: none"> <li>Self-service automation and much-improved applicant and hiring manager experience.</li> <li>Accurate timely reporting, including EDI candidate data: on application, shortlisting, interview and appointment</li> </ul>	HR
4	Core HR	<ul style="list-style-type: none"> <li>Succession Planning</li> <li>Performance Management</li> <li>Self-service automation and easy navigation</li> <li>Better decisions and efficiency (accurate timely reporting)</li> </ul>	HR
5	Talent management	<ul style="list-style-type: none"> <li>Self-service automation and easy navigation</li> <li>Strategic planning</li> <li>Accurate timely reporting</li> <li>Talent reviews and learning journeys</li> <li>Multi-platform functionality</li> <li>Efficient and effective learning management system</li> <li>Support development skills and careers pathways</li> </ul>	HR

Priority	Project	Benefit Expected	Workstream
6	Procurement	<ul style="list-style-type: none"> <li>Self-service automation</li> <li>Better decisions</li> <li>PO flipping on Portal (automatic invoice generation)</li> <li>Efficient invoice management</li> </ul>	Procurement
7	Receivables and collections	<ul style="list-style-type: none"> <li>Paperless direct debits</li> <li>Pay back dated invoices.</li> <li>Invoices electronic with useful information</li> <li>Self-service automation and easy navigation</li> <li>Customer portal; SMS for dunning</li> </ul>	Finance
8	Time recording & payroll	<ul style="list-style-type: none"> <li>Employee and manager self-service automation and easy navigation</li> <li>Better decisions (accurate timely reporting)</li> <li>Better controls to prevent payroll errors.</li> <li>Efficiency and cost reductions</li> </ul>	HR
9	Sourcing & contract management	<ul style="list-style-type: none"> <li>Self-service automation</li> <li>Better decisions</li> <li>Automated interfaces Improved supplier management</li> </ul>	Procurement
10	Expenses - including Purchase Cards	<ul style="list-style-type: none"> <li>Self-service automation and easy navigation</li> <li>Better decisions (accurate timely reporting)</li> <li>Data validation at time of entry</li> <li>Resubmission revisions by anyone in audit</li> </ul>	Finance

# Oracle Improvement Programme

Taking the output from the Oracle Value Assessment and Corporate priorities we will create an two-year Oracle improvement programme to bring together system and business process improvements and behavioural and cultural change required to implement them.

- The programme will be business led
- As well as prioritised improvements the programme will include mandatory / essential legislative work and future support and licence procurements
- There will be an initial tranche from now until the end of March 2024 to scope, plan and establish the programme, followed thereafter by focused delivery in separate tranches.

# Oracle Improvement Programme

Leveraging the capability of the system is a key enabler and will contribute to the delivery of the programme. It will contribute to the delivery of the Mayor's Business Plan in particular:

**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

The work of the programme will be:

- visible to the Mayor and CMT
- form part of the exit strategy for the Independent Assurance Panel,
- reported on in the Council's Annual Assurance Statement and,
- monitored by the Audit and Governance Committee.

The ultimate goal is for the system to streamline administration and to provide reliable data to drive good business decision making, both of which will reduce costs and improve business outcomes.

# Guiding Design Principles

- 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 become a “Best Value” Council
- Increasing value from the investment in the system

# Thank you

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