

Civica provides complete council management for Poole's legal and democratic services



As local authority funding budgets are squeezed ever tighter, purchasing IT has become an increasingly high-involvement decision. In an ideal world, the same software packages would be used throughout a council, not just within legal teams, in order to leverage the biggest return on investment and quantify the allocation of limited budget money for software.

That's exactly what happened at the Borough of Poole Council with Civica's case management system, Prescient+. Liz Hall, Business Manager at Poole Council explains how "Prescient+ was implemented following a procurement exercise in 2004 as an integrated time recording and case management application to introduce electronic methodologies to legal processes".

In June 2006, Liz was employed as Business Manager, overseeing all of the council's operations, initially tasked with training its legal team how best to use the Civica software.

"One of my first projects as a new recruit was getting our lawyers and their support staff fully conversant with Prescient+", continues Liz. "As I'd never used it before myself, step one involved training for me, then a period of self-familiarisation until I felt confident enough to pass on my newly learnt skills to others. The more I got to know the ins-and-out of the system, the more I recognised its potential in other business areas. Although purchased purely for management of legal case matters, a purpose it serves perfectly, it now does much more than this".

Expanding into other areas

With Liz as the driving force, and buy in from senior management, Prescient+ was expanded into freedom of information then elsewhere within the council.

"First, we invested time reviewing working processes for translation into workable flow files", states Liz. "We assigned key staff from each division in turn for this purpose. This preparatory period was essential to generate a flow file solution which ticked all the right boxes for every person involved in the various stages of work. Once we'd successfully completed roll out to freedom of information, other business divisions quickly followed suit.

"Next came work experience with fully integrated screens, workflows and worksheets for students on placement; the school admission and exclusion service is now fully integrated within the case management system; and our adoption panel processes have gone live with the system too with the fostering panel to soon come on board. Corporate estates with financial services are now reviewing its usefulness for their workload. By capitalising on the bespoke aspects of the system, Civica is continually evolving".

Introducing business continuity

With the system's automated case workflow and matter management functionality, firms are able to introduce business continuity for otherwise disruptive circumstances such as employee absenteeism.

"Prescient+ lends itself to anything you put your hand to. By thinking outside of the box and devoting in-house personnel resources to customise the system, you can extend it far beyond your legal team."

Liz Hall
Business Manager
Borough of Poole Council

"When our admissions clerk was absent from work on long-term sick leave some time ago, the school admissions appeal process almost grounded to a halt", says Liz. "By automating these largely repetitive procedures with flow files, and keeping a case history for each client in matter management style, any member of staff can easily pick up where another left off. Nothing intrudes on the day-to-day running of our council".

Within HR, Civica has also achieved many an advantageous application within Poole Council, being used for the full range of staffing matters, from recruitment of vacant posts to one-to-one performance appraisals.

"Many HR tasks are confidential", comments Liz. "Prescient+ allows us to lock down personal information, for example, disciplinary proceedings. Also, because some HR processes are unpredictable in nature, Prescient+ works as a matter management system, giving us the flexibility to progress organically through matters, storing communications and documents within each member of staff's file.

"Conversely, for predictable HR processes, for example, advertising vacancies and interviewing candidates, the step-by-step case management workflows and document templates automatically guide us through each stage progressively. It can be as flexible or rigid as you choose, adapting to your own unique circumstances".

Changing working patterns thanks to digital technology

The electronic characteristics of Prescient+ enable the introduction of mobile and home working for council employees, with integration across multiple software platforms providing extra assistance for their daily routine.

"Once you've set up your matter codes, you can work remotely", adds Liz. "We use a secure cloud application called Huddle to save sensitive documentation. We've moved from hard copy to electronic document storage which is more efficient. Norwel integrates with our diaries too, so we're given useful reminders when scheduled events draw near. The e-working capabilities and diary prompts support our staff through each and every working day".

In her concluding statement, Liz encourages other councils to perform blue sky thinking, set aside personnel resources and uncover Civica's true potential.

"Legal usage aside, Prescient+ lends itself to anything you put your hand to", stresses Liz. "By thinking outside of the box and devoting in-house personnel resources to customise the system, you can extend it far beyond your legal team".