

## **Report of the Evolve Task Group**

### **Purpose of the report**

1. To present the findings and recommendations of the Evolve Task Group for consideration by the Overview and Scrutiny Management Committee.

### **Background**

2. As part of the creation of the unitary authority in 2009, the council implemented a new SAP Enterprise Resource Planning (ERP) system to consolidate and modernise the different range of IT systems used by Wiltshire County Council and the District Councils. The council's SAP ERP solution had been in operation since 2009 without major upgrades, significant development, or sustained investment. It therefore required substantial spending to modernise it and ensure continued supportability. A replacement of the system was therefore necessary.
3. The Evolve programme was the procurement and implementation of a new Cloud-based Enterprise Resource Planning (ERP) system for the council. An ERP system is a type of software used to manage day-to-day business activities. At the council, this programme would impact upon the work of all staff in respect of human resources (HR), finance, procurement, and payroll. Its implementation aimed to modernise technology and standardise business processes, improving efficiencies for the core activities undertaken across the council. The adoption of ERP was supported through in-house business change and training, and was intended to deliver improved data, insights, and reporting capabilities.
4. The capital budget, £11.127m, reflected the requirements, capacity and risk mitigation required to deliver the programme. The budget was set against an initial benefits model quantifying several estimated cashable benefits as well as describing other cultural, behavioural, compliance and non-tangible benefits. It was estimated that the programme would deliver £17.439m total net savings in revenue budgets over an assumed seven-year term, (delivered across eight financial years) between 2021/22 and 2028/29.
5. Evolve was a major transformation and business change programme to embed new ways of working and increased efficiencies, including the development of an agile and flexible workforce, using technology, data, and process improvements.
6. Originally conceived to start in October 2021 and finish in March 2023, most of the ERP and HR functions went live in November 2023; payroll going live in April 2024.

7. On 16 November 2021, the Overview & Scrutiny Management Committee agreed to establish the Evolve Task Group. The task group first met on 14 January 2022.

### Terms of reference

8. The following terms of reference for the task group were endorsed by the Overview and Scrutiny Management Committee on 16 November 2021:
- a) To provide efficient, effective scrutiny engagement on the council's Evolve programme under the direction of OS Management Committee.
  - b) To receive periodic updates on the Evolve programme and scrutinise delivery of its key three objectives for the council, covering:
    - Organisational insight
    - Developing a flexible high-performance culture
    - Transforming business processes and digital technology
  - c) To meet quarterly as standard, unless there is a temporary need to meet more frequently or at a specific project milestone
  - d) To report findings and recommendations as appropriate to OS Management Committee following each task group meeting.

### Membership

9. The task group comprised the following membership:

Cllr Dr Monica Devendran  
Cllr Ruth Hopkinson  
Cllr Jon Hubbard (Chairman)

Cllr Horace Prickett  
Cllr Mark Verbinnen  
Cllr Mary Webb (to August 2022)

### Methodology

10. The task group had discussions with the following:

**Cllr Ashley O'Neill** (Cabinet Member for Governance, IT, Broadband, Digital, and Staffing)  
**Andy Brown** (former Corporate Director Resources & Deputy Chief Executive Officer)  
**Jo Pitt** (former Director – HR, Organisational Development & Transformation)  
**Stuart Honeyball** (Director – Business Transformation)  
**Lizzie Watkin** (Director – Finance & Procurement (Section 151 Officer))

**Andy Foster** (Evolve Change Lead)  
**Barry Jordan** (O&D People Change Service Manager)  
**Dermot Tully** (ERP implementation lead specialist)  
**Guy Beaudin** (Public Sector Business Development Director, Insight)  
**Kelvin Worley** (Senior Vice President, Mastek)  
**Faith Whitby** (Insight).

11. The task group would like to thank the officers and Programme Board for their full engagement with the task group and for their contribution to their work.
12. The task group met fifteen times between January 2022 and November 2024.
13. The task group's recommendations have been shared with the Executive and officers.

## Evidence

14. The task group drew upon the following evidence when developing its conclusions and recommendations.
15. *Draft Evolve Programme – ERP Replacement Business Case (2021)*. Presented to the task group in January 2022. This included the:
  - Case for change
  - Programme drivers
  - Objectives
  - Benefits
  - Scope
  - Commercial case
  - Financial case
16. *Risks Actions Assumptions Issues & Decision (RAAID) logs*. Presented to the task group at each of its meetings from July 2022; shorter summary logs were provided from December 2022. These included an assessment of:
  - Risks
  - Actions
  - Issues
  - Decisions
  - Dependencies
  - Assumptions
  - Deferred decisions
  - Lessons learnt
17. *Programme update presentations*. Presented to the task group at each of its meeting from July 2022, these were often shortened versions of presentations to the Evolve Programme Board. These were used in conjunction with the RAAID logs and normally included:
  - A programme summary
  - Progress against the programme plan
  - High level risks and issues
18. *South West Audit Partnership (SWAP) audit (August 2023)*. The task group saw an interim report from SWAP relating to the robustness of the decision making process for the programme to go live in November 2023.

## Conclusions

### General

14. The Evolve programme was a complex transformation process that included the implementation of a Cloud-based ERP system (Oracle) as well as an organisational and business change programme. The experiences of other local authorities in planning, resourcing and delivering such programmes has been mixed e.g., [Birmingham City Council](#), [West Sussex](#). It was therefore potentially inevitable that there would be significant challenges in delivering such a programme on time and to budget.
15. There were numerous technical and resourcing issues during the delivery of the programme. However, the programme was (as of October 2024) brought in budget. The technical and contractual issues were dealt with adeptly by the programme team and services areas concerned. This did lead to a change in the timescales for the programme, extending the development period, but ensuring that the ERP system was up and running and that SAP could be deactivated.

### Governance

16. The programme had a comprehensive and effective governance structure. The programme of delivery was subject to a multi-tiered governance and approval process. This was led by a Programme Board, the membership of which included the Corporate Director of Resources, the Director of HR & OD, the Director of Legal & Governance, the Director of Digital, Data & Technology as well as representatives from the delivery partners i.e., Oracle and Evosys (later Mastek). The Board monitored progress, discussed major decisions and signed-off milestones and payment releases.
17. The governance model enabled timely decision making and interventions particularly relating to the 'go live' decisions, which in the case of payroll needed to be rolled over. The task group throughout this process were confident that programme governance was fit for purpose and flexible enough to allow changes to be implemented that were based upon good evidence.
18. Part of that governance model was overview and scrutiny. The task group was involved in the programme for over two and a half years, unlike other task groups which sit for a matter of weeks. During that time it made a series recommendations which were adopted by the Programme Board, e.g. involving staff user groups. Throughout the task group worked to help shape the programme through constructive dialogue.
19. The task group recommends that this governance model be used for other major transformation programmes as it has been tested thoroughly and proved to be effective.
20. The task group perceived a gap in oversight in terms of the council's wider transformation programmes i.e., there is currently no Cabinet Member with overall responsibility for transformation programmes. The council is embarking upon and

delivering several long-term transformative programmes, across different portfolios, which would benefit from a voice at Cabinet.

(See recommendations 1 & 4)

## **Procurement**

21. The development of the tender documentation was overseen and supported by representatives from the council's Legal Services and Procurement functions and the Commercial Board, including external advice and quality review by Socitm Advisory Ltd.
22. A public procurement exercise through the Crown Commercial Services Data and Application Solution (DAS) framework agreement was used to tender the contract(s). Insight Direct UK Ltd were the contracting partner responsible for overall contract outcomes through their delivery partners Evosys (later Mastek) and Oracle.
23. Using a government framework allowed for a simpler, swifter tender process and move into contract signing. However, using the framework, in hindsight, also had significant limitations. This was particularly the case when dealing with commercial disagreements and addressing supplier performance, where the council's options for addressing these were effectively limited. It was also apparent that the framework could not deliver certain key technical requirements e.g., an address look-up function. There are many routes open to the council to procure goods and services that would be more flexible and better align with the council's requirements. The benefits and risks of procurement routes must be fully assessed for each project and government frameworks only used if, on balance, they are flexible enough to meet the council's needs.

(See recommendations 6 & 7)

## **Planning and resource management**

24. Programme resources were provided in several ways – via internal staff, consultants, agency workers, specialist technical roles (from Mastek) and supplier side. A detailed resource plan was created at the start of the programme which was broadly appropriate. As the programme developed, issues arose which included capacity constraints, recruitment challenges, staff turnover and limited capacity to second people into the programme. Resources were limited throughout the programme by the budget. Whilst the resourcing plan was based upon evidence it also assumed more support being offered by the provider than was the reality.
25. One of the recurrent issues experienced was processes that worked in the 'test' phase often needed remedial work when they went live. This naturally led to strains upon capacity, for example, there were a small number of overdue payments affecting one-time payments to pensioners (not their monthly pension), which had to be processed manually. This addressed the immediate issue but was a much slower process leading to a backlog of payments.

26. It became apparent that the resource plan would not provide sufficient capacity to effectively deliver a programme of this scale. It was difficult to prioritise the work of the programme and balance this against business as usual. This resource gap would adversely affect the council's ability to deliver normal services.
27. The Evolve programme was delivered in budget. However, this was through robustly managing the budget to changing and developing requirements. Discipline was required to remain in budget (including the contingency) for a programme that was significantly extended. The wider costs of extending the programme, rather than increasing resources, were not identified, and it could be argued that delivering on time might have been more cost-effective in the longer term. However, the additional costs incurred throughout impacted the council's capacity because funding for backfilling of roles and/or increasing team sizes was limited. There was also a need to develop tools which it was thought the supplier could provide.
28. Programmes of this type are not undertaken on a regular basis, and the council does not need to retain many of the skills and expertise required to be able to deliver them within the normal workforce. The council is therefore reliant on specialist contractors working through agencies and commanding significant day-rate based payments. To try and minimise the cost these resources are often brought in as late as possible and retained for the shortest period. On the Evolve programme particularly, the need for these types of staff resource and the duration for which the council could remain reliant on them post go-live was underestimated.
29. Future allocations for similar programme would benefit from more comprehensive and informed provision for external consultancy capacity, including earlier engagement with relevant agency market providers.
30. At the beginning of the programme the expectations of staff, management and stakeholders remain generally aligned to the specified requirements set out in the tender. However, over time, these expectations diverged, particularly as the council increased its knowledge and understanding of the product and its capabilities. Alongside this, is the perceived gap between the information and expectations that a supplier may have set in their proposal (and upon which the resulting contract is based) and the actual delivered product and outcomes.
31. Large scale change programmes are disruptive. They require not just a programme team to deliver but also sufficient capacity in normal service teams to be able to support the design and adoption of new business processes. Training had been supplied and delivered through the contract; however, the number of sessions has not been sufficient to transfer knowledge and develop confidence in the system. Specific technical training was still required. The training need remains ongoing. There should be better forward planning regarding future training requirements, based in part on the continual updates required of the Oracle system.
32. The business case for Evolve included a benefits case linked to and reflective of the outcomes being sought. In the initial stages of the programme there was a dedicated benefits workstream, however, over time this was reduced and finally dropped due to a lack of capacity. This meant that though benefits and activities to

deliver them were identified, these were not regularly reviewed and realigned to the status/ability to still deliver the programme. This has proven to be particularly important for the financial benefits (which are time-based) and the predicted staffing reduction/efficiency savings. It has become apparent that in the short term the adoption of Oracle and associated new practices will require more, not fewer, staff. In the short- to medium term the benefits case should have been revised accordingly.

(See recommendation 5)

### **Future learning and benefits realisation**

33. The delivery of the Evolve programme was challenging for the council, having to balance resource capacity, costs and budget, skills and expertise and the commercial nature of the external supply chain. Whilst the Oracle product is now live (with some ongoing work needed to finish and optimise some functions), there are many significant lessons that the council should understand and can learn from in future. The council also needs to continue to track the benefits identified at the beginning of the programme to understand how these have been realised and whether lessons can be learnt.

(See recommendations 2 & 3)

### **Proposal**

34. To endorse the report of the Task Group and refer it to the relevant Cabinet Members for response at the Committee's next meeting.

### **Recommendations**

**That the Leader of the Council and Cabinet Member for Military-Civilian Integration, Health and Wellbeing, Economic Development, Heritage, Arts, and Tourism considers:**

- 1. Assigns responsibility for overseeing transformation programmes to a specific Cabinet Member**

**Until such time as there is a Cabinet Member responsible for overseeing transformation programmes, that the Leader of the Council and Cabinet Member for Military-Civilian Integration, Health and Wellbeing, Economic Development, Heritage, Arts, and Tourism reports on progress with:**

- 2. Realisation of the benefits of the Evolve programme to Overview and Scrutiny Management Committee by November 2025.**
- 3. Implementing the task group's endorsed and accepted recommendations to Overview and Scrutiny Management Committee by November 2025.**

4. Other major change programmes adopt the governance model used by the Evolve programme, including an independent programme board, overview and scrutiny engagement and independent auditing.
5. The process for identifying and planning resource and organisational capacity for major transformation programmes is reviewed, learning lessons from the Evolve programme, including:
  - a) Assessing the necessary internal capacity and resources need to engage effectively with transformation, without affecting service delivery.
  - b) Major programmes require adequate budget for external consultancy capacity and early engagement with relevant market providers.
  - c) Externally delivered transformation programmes require adequate officer capacity for managing the relationship with the provider.
  - c) Supporting change management in a timely manner i.e., preparing, equipping, and supporting individuals through change, and delivering learning/training are key elements of major projects. The learning/training required should be identified and developed with user input.
  - d) Predicted programme benefits are reviewed at regular intervals during delivery and implementation.

That the Cabinet Member for Finance, Development Management, and Strategic Planning provides reassurance that:

6. In future, when considering the best framework for any procurement, the council will take into account how that framework supports implementation of the whole contract, the programme and legacy rather than focusing upon tendering and contract signing.
7. Procurement will review how it assesses the capabilities, previous performance, and sub-contracting models of tenderers.

That the Overview and Scrutiny Management Committee:

Thanks officers and the Programme Board for their open and honest engagement with the task group and their contribution to its work.

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**Cllr Jon Hubbard, Chairman of the Evolve Task Group**

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**Appendices**

None

**Background documents**

None

Draft