



Newsletter - User Group Special

TF User Group 2009 - Royal National Hotel, London 8th October 2009

The 10th Annual User Group returned to the Royal National Hotel in London this year. Once more the turnout was impressive with around 100 clients, old and new, meeting at the hotel just off Russell Square. The atmosphere was lively with everyone making the most of the networking opportunities provided by the breaks and lunch.

The morning session was opened by Mark Wardman presenting the results of the annual customer satisfaction survey – once again we are encouraged by the wealth of positive comments (“Excellent customer support! Reliable system, very user friendly”), the areas to improve (“Too many system reports, some containing repetitive and insignificant information”), and how you rated even higher scores for all of our services. Client feedback is important to us, so please continue to tell us what you think.



Ian Bond presented tf. web 2.0 in conjunction with Keith Wilkie of Sheffield City Council CYPS, one of the new web's early adopters. Our thanks to Keith for his contribution to the morning – it was a very informative session. Ian also gave a sneak preview of our new tf. web 2.0 KPI product (more about which more later on) and the soon-to-be released tf. web 2.0 DFC. Miranda Pocock gave a brief overview of TF's service offerings – squeezing a 20 minute presentation into the 5 minutes before lunch!

The afternoon session was split into 6 workshops – we would like to thank Keith Hutt of Hertfordshire County Council, John Andrews of Swindon Borough Council and Nigel Ford & Ian Pugh of Shropshire Council for their contributions to making these sessions such a success. Other sessions were run by TF staff on Capital Accounting, Beyond System Reports and tf. facility features.

The Audit Report - Keith Hutt, Hertfordshire County Council

Keith gave an informative and candid presentation on the background to Integrated Asset Management System (IAMS), Hertfordshire County Council's implementation of tf. facility.

His talk covered some of the history going back to 2003, where HCC had numerous individual lists, spreadsheets and idiosyncratic systems, with very little co-ordination or consensus.

They made the key decision to extend the implementation of tf. facility which has been at the core of IAMS for over 5 years. HCC also separate out the processes of data collection and data management, thinking in terms of “data providers” and “data demanders”, rather than “data owners”.

The implementation of IAMS is seen as being a very positive move, with funding decisions now data driven and IAMS data accepted as being valid. Having accurate and consistent data encourages confidence and enables joined up thinking across departments.

The effort to transition to one system is not to be under-estimated. It's a mistake to transfer data without cleansing or justifying it; and once it's in the system a data change control process is imperative to ensure accountability and consistency. All key people need to be consulted and involved but there comes a point where ultimately users need to be told that only one master data source should exist.



Keith Hutt, Hertfordshire C.C

It's important for users to understand what they need from the system but it's equally important to acknowledge what the system does not provide.

But even when you're getting it right, there is often more work to be done.

Following the audit of HCC's 2008/2009 accounts and the introduction of the upcoming IFRS regulations, HCC are in the process of reconciling all their fixed asset data and providing valid valuations for each property. These validated records will then be transferred into IAMS in time for the auditor's review early in 2010. A challenge, but one to which HCC will undoubtedly rise.

Keith Hutt is the Systems Development Manager at Hertfordshire County Council. Keith can be contacted at keith.hutt@hertscc.gov.uk

The web and DFC - John Andrews, Swindon Borough Council

John gave a lively and entertaining look at what some might consider a dry topic. He identified that the key issue is keeping the data on the property portfolio up to date. Devolved funding has made that task even more challenging: schools have responsibility for the operation and management of sites, often with varying degrees of expertise in facilities and property management.

What was needed was a solution that would work for a range of schools of different statuses e.g. voluntary aided, voluntary controlled, foundation, PFI and Academies. The challenge was how to engage the schools to provide updated information when works were carried out. It needed one (and only one) data source holding all the details on what and how schools were using their Devolved Formula Capital (DFC) budget and also to track spending on other projects. Head teachers, bursars and site managers wanted a solution that was quick and easy to update and did not rely on annual audits and reporting which was an overhead to both the schools and the Local Authority.



John Andrews, Swindon B.C

Following a visit with Linda Hempston of Surrey County Council, where DFC was demonstrated, it soon became clear that tf. web DFC would provide the solution. In April 2009, Swindon launched tf. web Projects / DFC Online.

tf. web DFC allows schools to see their current DFC budget at a glance. For Swindon, the funds are held by the Local Authority. Projects/DFC Online shows funds approved for release and funds actually released. It also shows the contribution that schools are making to capital projects run by the Council. tf. web DFC allows the schools to add projects and also for the Local Authority to record any projects they are carrying out at the schools.

By holding this information in one source and allowing both the schools and the Local Authority to add and update project funding information, it meets the DFC Reporting and Audit requirements and also reporting requirements for DCSF. It is also easier for schools to use and provides just one source of information.

John finished his presentation by saying how much SBC are looking forward to implementing the forthcoming tf. web 2.0 DFC towards the end of 2009. The new web environment will enable SBC to tailor their website to their users' requirements, provide a key document library and ensure that both schools and the authority are more fully informed.

John Andrews is Swindon Schools Asset Management Planner at Swindon Borough Council and can be contacted at jandrews@swindon.gov.uk

tf. web - The Sheffield City Council CYPS Experience, Keith Wilkie

Keith's presentation looked at how Sheffield CC CYPS has implemented tf. web 2.0 as an "early adopter" of the software. SCC CYPS took part in the initial focus groups and were keen to be amongst the first to implement the new web.

SCC found the initial product training useful and thorough. The product was installed a few days after. Taking on the role of development partner and early adopter, SCC were prepared to carry out some field testing and whilst there were some small initial technical issues at the outset, communication and support were excellent throughout the process.

Keith explained how it took SCC two weeks to set up basic pages to roll out to end users; TF support throughout this process was excellent. SCC are still in the process of setting up their final pages which is the hazard module.

Once the pages were set up, they moved on to set up users, which they found quite straightforward once groups and permissions were configured. The set up allows flexibility in the information you want different groups of users to access. At this stage SCC CYPS has not yet developed different style pages for different groups of end users, keeping it simple at the start.

The rollout to end users has also been quite straightforward, the website is easy to navigate therefore the requirement for training has been minimal. There have been few help calls from end users and user feedback has been very positive.

Keith suggested that a great tip was to use the 'Set current as default' button on the admin pages which is really useful if you find you don't like what you've done to your pages or if a different administrator makes unintentional changes to the site.

In summary, Keith stated that "although we have encountered some technical issues whilst moving to the new product, the improved look and feel on the website is definitely worth the transfer and the feedback from our end users has been very positive".



Keith Wilkie, Sheffield City Council

Keith Wilkie is Principal AMP Officer at Sheffield City Council, CYPS and can be reached at keith.wilkie@sheffield.gov.uk

TF would like to thank Sheffield City Council CYPS for all of their hard work as a development partner for tf. web 2.0 and their help proving tf. web 2.0 to be a robust customisable solution.

Corporate Suitability - Integration with CAA and KLOE - Nigel Ford, Shropshire Council

Nigel began his presentation by reviewing the key drivers behind the need for Corporate Suitability assessments. CAA is the move from CPA to area-based "Total Place" assessments, with emphasis on value for money and service improvements. Nigel set out some of the key items from the KLOE guidance – properties should be fit for purpose, deliver better value for money and benefits to the local community. Opportunities for shared use should be investigated and benchmarking and performance indicators should be used to contribute to the achievement of corporate and service objectives, including improvement priorities, sustainability objectives and the setting of challenging targets for improvement.

Other national initiatives and pressures include Regional Improvement and Efficiency Programme – potential savings through shared facilities, functions and data.

Nigel continued by defining corporate suitability as "The quality of being suitable" – this includes fit for purpose, meets requirements / needs, appropriate to needs, apt for use, pertinent, seemly, eligible, consonant, corresponding to specification and congruous.

Shropshire Council has already measured corporate suitability for a number of services including Countryside, Libraries, Registrars, Depots and some offices. The following suitability criteria have been employed: Location, Layout, Sufficiency (space/capacity), Health & safety, Access, Environment/Ambience, Security and IT & Communications.

Once these criteria have been measured, an overall assessment is made taking into account the following: Fitness for purpose, age obsolescence, application of legal standards/requirements. In addition, any areas where urgent attention is required and / or there is immediate scope for rectification/ improvement.

A scoring system has been adopted where A is Suitable and D is unsuitable. At the same time, for each service, each criterion is then ranked 1-10 with 1 being most important.

Nigel demonstrated how tf. facility's Corporate Suitability module has helped Shropshire Council reach this point. Nigel explained how there is a need to correlate property performance with service outcomes and that tf. facility Corporate Suitability will be the most powerful measurement to accomplish this.

The tf. facility Corporate Suitability module has enabled Shropshire Council to set up their questionnaire, test outcomes and create service-appropriate questionnaires and weightings. The resultant suitability scores provide a meaningful measure for Corporate Suitability across all services.

Nigel Ford is Head of Estates Services at Shropshire Council and can be contacted on Nigel.Ford@Shropshire.gov.uk

••• Stop Press ••• New Products •••

As demonstrated at the Annual User Group!

TF has recently launched the new product **tf. web 2.0**. This exciting new product also forms the platform for new products that we will be releasing this autumn and winter including:

- **tf. web 2.0 KPI** – the bespoke reporting tool you have been dreaming about! You can create hundreds of different Key Performance Indicators (KPI) that are specific to different types of staff to enable them to focus on the right priorities and make the right type of decision
- **tf. web 2.0 DFC** – gives you the power of both project management and devolved formula capital (DFC) in one solution, ensuring effective management of both budgets and projects

*Watch out for more details on how you can learn more about **tf. web 2.0** and view an online demonstration.*

Regional User Groups

TF is proud to announce the roll-out of its Regional User Groups. These meetings will focus on ensuring you maximize value from your existing TF products by

- Sharing ideas and best practices with other local users and TF's professional staff
- Discussing the impact of policy initiatives and other national and local issues
- View the latest products
- Participate in workshops on how specific TF products and its uses could improve your Local Authority
- Gain from exclusive regional meeting offers to those Authorities who attend

We plan to make them lively, valuable and enable you to deliver an impact back in your authority. Our first one starts on 18th December 2009 at Shropshire Council. To book your place call Miranda Pocock on 01943 855029 or email her at miranda.pocock@technologyforge.com. Please watch out for more details of a regional meeting coming near to you soon.

Midlands Regional User Group Shropshire Council Shirehall, Shrewsbury

18th December 2009 - 10 am to 4 pm

We are pleased to invite delegates to the first Midlands Regional User Group hosted by Shropshire Council.

This is an opportunity to meet other authorities in your locality, share business practices, network, view new products and discuss common issues.

An agenda will be available shortly, but to book your place, and also to volunteer to run a workshop or to submit agenda items, please email

tom.whittle@technologyforge.com



New Open Training Courses

Report Writing with MS Access - Foundation

All new course with emphasis on **tf. facility** core data structures, manipulating data, publishing reports to users, demystifying queries and including our great new course materials

North: Tuesday 2nd February 2010 - Otley

South: Tuesday 9th February 2010 - Venue TBC

Individual delegate rate of **£350** per day – sign up by 30/11/2009 for a discounted rate of **£300!**

Places are strictly limited—contact Henrietta at

henrietta.karwaszewski@technologyforge.com to book now!

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