Warwick District Council

Bereavement Services – Replacement crematorium system

Digital services so good that people prefer to use them

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Revision History

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4.0			

Approvals

This document requires the following approvals:

Title
ICT Steering Group
Rob Hoof – Head of Neighbourhood Services
Pam Chilvers – Bereavement Services Manager
Mark Bayliss – Application Support Analyst

Distribution

This document has been distributed to:

Name	Title

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1 Business Problem Analysis

Background

Bereavement Services use a semi-bespoke software system "CAS" (cemetery and crematorium administration system) to manage the daily work flow for the cemeteries and crematorium activities. The system is used to manage the diary bookings and process data for burials and cremations; it then produces daily work lists detailing the individual requirements for each funeral taking place, including music, instructions for the cremation, disposal of cremated remains and any other special requirements. It also enables instructions for grave excavations and memorial erections to be managed via contractors and 3rd party providers.

CAS was purchased by Warwick District Council c1993

CAS acts as a database for records; this database forms permanent statutory registers in compliance with The Cremation (England and Wales) regulations 2008 [regulations 32.-35.] and The Local Authorities' Cemeteries (Amendment) Order 1986 [article 2], although only for cremations and graves that have been used since 1993.

Cemetery plans for approx. 50,000 graves totaling approx 63 acres spread out over 5 sites together with burial and cremation records prior to 1993, all of which form part of the statutory registers are still stored in manual paper registers and not on CAS.

CAS provides some management statistics and financial data to aid management of the service.

1.1 Business Problem

A summary of the core business problems

- Functionality has changed very little since the original install; most updates are supplied to resolve issues or changes at the services request.
- CAS currently uses and unsupported Microsoft product and as a result is not PSN compliant.
- The system is currently supported by the original developer, who is a sole trader and wants to retire. Therefore there is very little resilience from the supplier for this crucial system.
- Automatic booking system for Funeral Directors is not compatible with current Microsoft operating systems and therefore is not PSN compliant. Mitigation for this none compliance has previously been in place. However the system is no longer used, as it has proven to be too unreliable and caused too much inconvenience and distress to bereaved families.

1.2 Business Opportunity.

The need to update the system also presents several opportunities. Bereavement services would like to improve the service it provides but this is not possible with the existing technology. These benefits included:

- Integration with finance system, so invoices can be raised automatically.
- Online booking facility for funeral directors.
- Better statistical analysis and reporting of services/income.
- Mapping / GIS functions for plot locations (following capture exercise).

- Potential for mobile solutions for contractors / frontline staff.

- Efficiency improvements and self-serve opportunities will help support the provision of the proposed 6 day service provision.
- Improved diary and fee management.

2 Preferred Solution

2.1 Options considered

2.1.1 Do Nothing

Doing nothing has been discounted.

- The limited functionality of CAS having a negative impact on the processes and management of the business.
- The potential loss of data if CAS fails would result in the Council being in violation of its statutory obligations. (NB there is already at least one aspect of the system that has failed, for which the programmer is not able to find a solution) This is reflected in the business risk register.
- CAS is not PSN compliant.

2.1.2 Upgrade the existing software

Upgrading CAS has been discounted

- Unless CAS was migrated onto another platform upgrading it would not address the existing security and compliance issues.
- Whilst no enquires have been made of the existing supplier it is known that many councils have replaced CAS and therefore with fewer users the potential for costs of development being covered by support costs is unlikely and would therefore potentially be expensive.

2.1.3 Explore developing a new module for an existing system

The council has a number of software solutions that are used across departments which are used for asset and case management e.g. Civica APP, ActiveH.

Commissioning a bereavement services module for one of these systems has been discounted.

- There is not an existing bereavement module for any of these systems that could be bolted onto the existing system.
- The way data is managed in these systems is not compatible with the way bereavement data is managed and the suppliers having no experience of our business may not envisage potential problems.
- WDC would be the sole customer for this module
  Costs for development are likely to be prohibitively expensive or of little interest to the suppliers
  The development of the system is likely to be static unless Bereavement Services ask for upgrades, overtime this is likely to lead us to a situation that we are currently experiencing with CAS
- If the main users of the system decide to upgrade or replace their software solutions Bereavement Services could be left being the only user of the system.

2.1.4 In-house development

Developing a system in-house has been discounted

- Not practical due to the size and scope of what is required for a complete cemetery and crematoria solution.

2.2 Solution [Purchase an off the shelf configurable solution]

This is considered to be the best solution.

The UK market for cemetery and crematoria software is relatively small with 2 main suppliers being used by the majority of both municipal and private crematoria. Either is, at this point, considered to be a viable solution.

There are a number of suppliers who provide software for cemetery management but do not have any functionality for crematoria; these have been discounted because a complete software solution is required.

There are a few established software companies, some based abroad and some who are diversifying to satisfy UK cemeteries and crematoria. These have been discounted, further details of why they were not considered suitable can be found in a preceding report Bereavement Services – potential software solutions.

It is possible that when the tender and procurement exercises are carried out further suitable solutions will be revealed.

2.2.1 Description

Based on initial market enquiries, there is currently a "short list" of 2 potential suppliers; these are the UK market leaders for cemetery and crematoria software:-

A ClearSkies software - **B**urial **A**nd **C**remation **A**dministration **S**ystem (**BACAS**)

B Edge IT Systems Ltd – **Epitaph**

Both solutions offer similar improvements for the processing data, creating workflow, management reporting, finance integration and mapping functionality. However there are differences in the required infrastructure, how the data is accessed and stored. Along with differences in the way they are purchased, licenced and how support is funded.

Decisions around data security, infrastructure reliability or preferred purchase options may well lead to one or the other becoming the preferred solution.

2.2.2 Benefits, Goals and Measurement Criteria

Either of the preferred solutions will provide solutions to the business problems outlined in section 1.1 in addition there will be improvements for customers, stakeholders, staff and the council.

Complete the following table:

Category	Benefit	Value
Financial	• Improved invoicing timescales. • Quicker payments and more opportunity to make payments in advance • Improved opportunities for ancillary sales • Cost saving, fewer telephone lines required	Approx 15 hours per month saved inputting invoicing into Total system. These hours will be used to extend service provision to 6 days.
Operational	• Compliance with statutory instruments • PSN Compliance • Greater efficiency in processing income • Greater efficiency in data management, all information will be accessible from one data base • Enhanced resilience • Better quality management information and performance management • Improved ability to interrogate and cross reference data. • Improved administrative efficiency (fewer keystrokes etc, no need for additional manual processes …) • Enhanced availability of service • Improved information for contractors and 3rd party service providers • Less double handling data • Opportunities to take advantage of future advances in technology	It is anticipated that it may take some time to encourage stakeholders to use automated systems and time saved answering the phone is difficult to accurately quantify, however over time these time savings will enable staff to dedicate time to income generating activities and extending service provision to 6 days.
Customer	• Improved “self-serve” opportunities for customers via web ordering and bookings which will make some elements of the service available 24/7 • Improved communications with customers and stakeholders • Enhanced availability of officers will give greater choice for day/time of service provision	Less distress for bereaved families
Staff	• Increased staff satisfaction • Improved communications and access to information for mobile workers • Opportunities for increased mobile/agile working • Fewer interruptions	

2.2.3 Digital Benefits

Description	Value
How many citizens will the project benefit?	*There are currently 54 authorised funeral directors, acting as agents for bereaved families who would have access to the out of hours booking service.*
How many transactions does the business process deal with? *Cremation.* *Burial* *Burial / scattering cremated remains* *Cemetery memorial applications* *Book of remembrance applications* *Genealogical research* *General funeral planning advise* *Transfer ownership of exclusive right of burial* *Communal memorial services and Other events…* *Most of these services will involve multiple contacts with each customer, however at this time statistics for each contact are not recorded only the number of times each service is provided.*	 1800 180 250 250 180 200 50 125 15
What is the average current duration of the process from service request to completion?	**10 – 20 days**

Costs and Funding Plan

PLEASE NOTE COSTS ARE INDICATIVE BASED ON INITIAL CONVERSATIONS WITH SUPPLIERS AND NOT BASED ON QUOTATIONS OR TENDERS		
Capital Costs	**Amount – BACAS**	**Amount - Epitaph**
• Initial software purchase	20,400	No initial cost hence higher licensing and support costs
• Digitization of maps	14,000 to 28,000	14,000 to 28,000
• Data gathering • New hardware	1,000	1,000
• Temporary additional resources • "risk" contingency	Cost of new server + SQL licenses or virtual server	
Total		
Revenue Costs	**Amount – based on 10 year licensing and support**	
• Software license costs – main system	23,500	48,000
• Software license costs - mapping	Included in main system	7,000
• Support costs	Included in license costs	Included in license costs
• Permanent additional resources to maintain/operate system/process		
Total	**59,000 to 73,000**	**70,000 to 84,000**

For both the capital and revenue amounts identified above, please indicate how the funding will be made available.

Funding Source	Amount	Notes
The budget book shows £656,000 in the business transformation reserve and £474,000 in the ICT replacement reserve		
A separate business case which will need approval of employment committee and will include significant operational changes designed to improve the service and generate additional income will fund the growth in the revenue budget.		

10.1.1 Risks

Summarise the most apparent risks associated with the adoption of this solution.

Description	Likelihood (1 – 5)	Impact (1 – 5)	Mitigating Actions
Being able to deliver this project (and other subsequent business improvements) will depend upon a service area restructure being funded by executive and approved by employment committee`	1	5	Fixed term recruitment for interim period either to manage this project or back fill operational duties ordinarily performed by Bereavement Services Manager. This will ultimately increase costs as the resource will be associated with this project rather than across the business.
Additional, unexpected costs may be required to cleanse data in existing system before migration	3	3	Investigations into data integrity to be built into project. Assessment of time/cost of cleansing data to be compared to cost of inputting data from original source documents rather than migrating. Existing system has more than one database, it may be possible to only migrate clean(ish) data and input other data from original source.
Broadband link may not be delivered as anticipated, which would restrict choice of product	1	5	Estimated completion for improved link is anticipated in advance of going to tender, this will give infrastructure team opportunity to confirm suitability or alternative requirements.
Restructure consultations may			Accept the risk – consultations are likely to

result staff changes/vacancies… This may cause delay, interruption or lack of consistency within the project			have taken place in advance of initiation of this project.
Existing plans may not measure-up to on the ground features	5	3	Contingency risk budget. Exclude one or more sites from mapping phase of project
Files being exported by new system may not integrate easily with other council products, this may cause extra work for ICT, additional costs	3	3	Initiate studies and conversations about compatibility in advance of committing to one solution or another. Contingency risk budget
CAS fails before new system is operational or has been fully tested	1	5	Existing business continuity and recovery plans (perhaps! – not sure this is fully resilient though) Data could be input from original source documents, estimates for this should be included in contingency risk budget
Unforeseen data migration issues – Eg fields not matching up properly…	3	3	Project to include discussions with colleagues who have previously migrated from CAS to chosen system
There are some decisions that have not yet been made or fully investigated; these may have a profound impact on the distribution of workload between supplier, users and ICT dept.			Agree acceptable tolerances in advance of project initiation and at each project stage.

To complete this section thoroughly, it may be necessary to undertake a formal Risk Assessment. To reduce the likelihood and impact of each risk occurring, clear 'mitigating actions' should be defined.

10.1.2 Issues

Summarise the highest priority issues associated with the adoption of this solution

No.	Issue - Description
1	Officer issue
2	Integration of other WDC systems

10.1.3 Assumptions

List the major assumptions associated with the adoption of this option.

No.	Assumption - Description
1	Broadband link
2	Restructure of service provision (will provide resource needed to free up BSM time)
3	Successful integration/ compatibility / export of data into existing council wide software solutions
4	New system will be compatible with WDC preferred platform and existing ICT expertise (eg SQL, Not

	Oracle…) and will operate on existing servers/PCs.

11 Implementation Approach

11.1 Outline Project Scope

The project has a number of streams, some of which will be delivered by the supplier for the new software, some will be delivered in conjunction with existing council wide software solutions and some will be delivered in-house through ICT development.

- Evaluate all the business requirements and ICT requirements of a new solution and create software specification
- Secure resources – funding & officer time
- Procurement
- Assess existing data cleanse in CAS if appropriate
- Assess existing manual records and determine most cost effective solution to having them available in new system
- Agree configuration requirements for new system
- Assess any implications for GIS, CAD or other plan / map system
- Agree method for digitizing existing plans / maps and what if any integration with existing map system is relevant/cost effective/desired/useful…
- Agree timescales for installation and testing new system
- Agree timescale to migrate data from CAS and date for CAS to pass into legacy status
- Agree protocol for publishing information and access criteria for stakeholders and public; this should include a fee charging and exemption policy.
- Agree most cost effective solution for customer on-line orders and payments (ie. Via new system or development of existing web based ordering)
- Agree interfaces with finance and payment systems along with website integration.
- Arrange staff training
- Agree hardware requirements for mobile staff
- Agree hardware requirements / negotiate purchase options with contractors
- Agree processes for notifying contractors of service requests and if possible conformation from contractors that work is complete
- Identify criteria to become an “authorised” stakeholder
- Agree processes, rollout timetables and training requirements for stakeholder interaction with new system
- Install hardware to enable customers to “self-serve” in Oakley Wood (in preference to installing PDQ machine)

Whilst proceeding through the stages of this project there may be opportunities that arise outside the initial scope of the project but could be considered for future development or improvements, many of these are as yet unknown:

- It may be possible to integrate a touch screen “Self-Serve” into off site cemetery notice boards
- Future development of a cemeteries app may be possible to navigate and assist with finding grave locations.

11.2 Service Area Resources

Please use this section to describe how the service area is going to produce the necessary capacity to deliver the project. Specific consideration should be given to:

- who will act as the project manager? Pam, Rob Mark etc…
- Design authority: Pam Chilvers (back office) Michael Branson (public facing elements)
- who will undertake testing? Staff
- Final Sign off: Pam Chilvers
- who will require training? staff
- System owner: Pam Chilvers

11.3 ICT Services Resources

This section should be used to describe the resource to be provided by ICT Services. To do so, the service area sponsor will need to meet with the ICT Services Applications Support Manager to agree the project scope and likely method of approach.

- Apps Support Analyst
- Business Analyst?