we are your transformation partner

This is the Strata business plan for 2024/25

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Correct at time of production

In our business plan

Executive summary

The business plan serves as a crucial framework primarily intended for budgetary purposes. It delineates the financial parameters and strategic considerations essential for the successful execution of the proposed plan for 2024/25. However, it is imperative to highlight that the intricacies of requirements, design specifications, and delivery mechanisms are subjects that necessitate scrutiny and consensus. As such, the individual proposals are to be thoroughly examined and agreed upon at the architecture board level, contingent upon the overarching approval of the outlined business plan.

This Business plan is in direct response to the councils desire to transform and invest in ICT, and has been developed in conjunction with each of the councils digital strategies.

The architecture board serves as the discerning authority to evaluate and sanction the alignment of project intricacies with the overarching strategic objectives, ensuring a seamless integration between financial allocations and the technical intricacies required for project success. This dual-layered approval process ensures a comprehensive and cohesive approach to project development.

This document is intentionally crafted to cater to a diverse range of audiences, acknowledging the multifaceted nature of its subject matter. Given the intricate details inherent in describing an Information and Communication Technology (ICT) business plan, there are sections that delve into technical aspects, which may render certain portions of the document more specialized in nature.

This document is intentionally crafted to cater to a diverse range of audiences, providing clarity and insight for both technical and non-technical stakeholders

This technical depth is a necessary component to ensure an accurate and comprehensive depiction of the ICT business plan, allowing for precise articulation of the technological requirements, frameworks, and innovations that underpin the proposed strategies.

While some sections may appear more technical, the document endeavours to strike a balance, providing clarity and insight for both technical and non-technical stakeholders. This approach aims to foster a shared understanding among a diverse audience, promoting informed decision-making across the spectrum of stakeholders involved in the realization of the ICT business plan.

This business plan is strategy led, taking all three councils' vision for the future, and distilling into three core areas: transformational (the enablers that provide a platform for change), organisational (changes within strata to optimise efficiency) and operational (areas that require focus).

These areas will be discussed at length within this document and are as follows:

Organisational enablers

- Restructure
- ITIL process review
- ICT Service Desk realignment
- Growth strategy
- Print and post consolidation
- Rebranding
- Creation of Digital Collaboration Forum

Operational enablers

- Licensing model
- Finance model
- Reduce carbon footprint
- Councillors' ICT
- Prepare for cloud migration and server reduction
- Cyber security
- Rationalise and transition copper telephone lines

Transformational enablers

- End user computing
- Contact centre and telephony
- CRM and forms
- Enterprise middleware architecture
- SharePoint
- Bookings
- Notifications
- Power Platform
- Data and data warehouse
- Web content and chat bots

The above will provide partners with a solid footing to deliver MTFP savings but the sheer amount of change in the above should not be underestimated for each respective organisation. To support this and avoid change fatigue strata will work with the councils to ensure a change programme is properly managed through the new governance, model set out in the mandate.

The below diagram sets out the indicative timeline when elements from the MVP will be available each enabler in this diagram is described later in the document.

Time frame:

Q1 and Q2 2024/25		Q3 to Q4 2024/25	Q4 2024/25 onwards	

Organisational enablers

Q1 and Q2 2024/25		Q3 to Q4 2024/25	Q4 2024/25 onwards
• Restructure • ITIL process review • ICT Service Desk realignment	• Rebranding	• Growth strategy • Print and post consolidation	• Creation of Digital Collaboration Forum

Operational enablers

Q1 and Q2 2024/25		Q3 to Q4 2024/25	Q4 2024/25 onwards
• Reduce carbon footprint • Licensing model • Cyber security • Councillors' ICT	• Creation of Digital Collaboration Forum • Print and post consolidation	• Finance model	• Prepare for cloud migration and server reduction • Rationalise and transition copper telephone lines

Transformational enablers

Q1 and Q2 2024/25		Q3 to Q4 2024/25	Q4 2024/25 onwards	
• CRM and forms	• Power Platform	• Contact centre and telephony	• SharePoint • Data and data warehouse	• Bookings • Notifications • Web content and chat bots

The 2024/25 budget Contract Payment is £8.3m, which reflects increases on the prior year largely due to high Inflation of third party and staffing costs, further compounded by less favourable bank rates and high revenue costs of Microsoft and new phone system renewal. Restructure costs have somewhat been offset by budget efficiencies made within the last six months.

A full description can be found in appendix A.

Contract Payment	Budget 2024/25	Share by council 2024/25	2025/26	2026/27
EDDC	£3,213,432	38.7%	£3,325,532	£3,433,762
ECC	£2,788,034	33.6%	£2,883,512	£2,977,356
TDC	£2,297,857	27.7%	£2,364,499	£2,441,452
Total	£8,299,323		£8,573,543	£8,852,569

Executive summary

The transformation agenda, requires a capital investment in both specialist resource and hardware the cost per authority is shown below:

	2024/25				2025/26	2026/27
	Total	**Funded by EDDC**	**Funded by ECC**	**Funded by TDC**		
Percentage split as per the original business plan		38.8%	33.6%	27.6%		
Project						
Contact centre telephony	£50,000	£18,346	£17,968	£13,686		
Core telephony	£50,000	£18,346	£17,968	£13,686		
EUC model staff	£40,000	£14,677	£14,374	£10,949		
EUC model equipment (replacement laptops)	£297,660	£30,750	£242,310	£24,600	£250,000	£250,000
Booking	£50,000	£18,346	£17,968	£13,686		
SharePoint resource	£60,000	£22,015	£21,562	£16,423		
Chatbot	£50,000	£18,346	£17,968	£13,686		
PSTN	£30,000	£11,008	£10,781	£8,212		
Print and post review	£20,000	£7,338	£7,187	£5,474		
Website	–	–	–	–	£30,000	
Total capital Funding	**£647,660**	**£159,172**	**£368,086**	**£120,402**	**£280,000**	**£250,000**

1   Context from ICT director

In the ever-evolving landscape of Information and Communication Technology (ICT), Strata stands at a pivotal point of significant change. As we approach the fiscal year 2024/25, we find ourselves at the cusp of a transformative journey that promises to reshape not only our organisation but also our Partners entire ecosystem. Our forthcoming business plan is poised to guide us through these exciting times of innovation and adaptation.

This plan, rooted in the councils strategies and vision, focuses on a strategic shift towards the transformation of our partners. As we navigate the ever-changing currents of the digital world, we are committed to equipping our partners with the tools, knowledge, and capabilities they need to deliver services to the public of Devon.

During the past six months we have laid the bedrock for an ambitious business plan for 2024/25. Some of the items completed are as follows.

✔ **Achievements in governance and mandate**
In the previous year, our organization made significant strides in enhancing its governance and mandate, which laid the foundation for several key accomplishments. These achievements reflect our commitment to improving operations and serving our stakeholders more effectively.

✔ **Kanban process**
We successfully implemented a Kanban process to streamline our project management and workflow. This agile methodology allowed us to increase productivity, reduce lead times, and enhance transparency in our operations.

✔ **Performance reporting dashboard**
The introduction of a performance reporting dashboard was pivotal in enabling transparency to our partners. It provided real-time visibility into key performance indicators, empowering decision-makers with data-driven insights to make informed choices.

✔ **Asset management portal**
Our asset management portal improved the tracking and maintenance of our organisational assets, leading to greater efficiency and cost savings.

✔ **Accessibility**
With the introduction of Office365 we have greatly enhanced our offering of accessibility tools for staff, including dictation and screen readers.

✔ **Improved change management process**
We revamped our change management process, ensuring smoother transitions and minimizing disruptions during changes and upgrades.

✔ **BYOD (bring your own device)**
The implementation of BYOD policies allowed employees to use personal devices for work, boosting flexibility and productivity while maintaining security protocols.

✔ **Office 365**
The adoption of Office 365 enhanced collaboration and communication within the organization. It facilitated seamless document sharing and improved overall productivity.

✔ **Service improvement plan catalogue, SLAs (service level agreements)**
We developed a comprehensive service improvement plan catalogue and implemented SLAs to set clear expectations and ensure high-quality service delivery.

✔ **Multiple upgrades in hardware and software**
Our commitment to staying up-to-date was evident in the multiple hardware and software upgrades carried out.

✔ **New housing system in East Devon**
We successfully implemented a new housing system in East Devon, streamlining processes and improving service delivery in the region.

✔ **Finance system**
The new finance system convergence across all partners, starting in Teignbridge, and will improve financial transparency, accuracy, and reporting, aligning our partners with best practices in financial management.

✔ **Intelligent clienting**
Working with partners to reinvigorate the focus to manage and prioritise workload, supporting Strata to deliver maximum business value.

✔ **Cloud-based GIS mapping**
The transition to cloud-based Geographic Information System (GIS) mapping increased accessibility and data accuracy, benefiting various departments and projects.

✔ **Policy compliance software issued**
We introduced policy compliance software to ensure that our operations adhere to regulations and guidelines, reducing compliance-related risks.

✔ **Budgeting baseline and redefined process**
The refinement of our budgeting processes led to a more accurate baseline and a better understanding of our financial position.

✓ **ITIL (Information Technology Infrastructure Library) process review**
We started a thorough review of our ITIL processes, ensuring that our IT services align with industry best practices.

✓ **Decarb Forde House**
Our commitment to environmental sustainability was evident through our support of the successful Teignbridge led decarbonization of Forde House.

✓ **Management restructure**
A management restructuring initiative was implemented to improve decision-making, streamline operations, and foster greater accountability.

✓ **Data strategy**
The development of a comprehensive data strategy allowed partners to harness the power of data for more informed decision-making and improved services.

✓ **Reduced backlog of requests by 20%**
Worked with partners to significantly reduce the backlog of service requests, ensuring that our stakeholders receive faster and more efficient service.

✓ **Increase Service Desk open hours**
Expanding service desk operating hours increased accessibility and support for our clients, ensuring they receive assistance when needed.

✓ **Performance management**
Robust performance management processes were established to ensure employees and teams are motivated and aligned with organizational goals.

✓ **Webcams – engagement policy**
The introduction of webcams and an engagement policy improved remote working conditions and fostered a culture of inclusion and connection.

✓ **MS license**
Efficient management of Microsoft licenses and optimized software costs, to ensure compliance and futureproof digital transformation agenda.

✓ **Reduced energy consumption**
We actively worked to reduce our energy consumption, contributing to our sustainability goals and cost savings of approximately £10,000.

These achievements in governance, mandate, and various operational areas provide a platform for strata to progress and innovate in the incoming business plan.

1.2   2023 Strata staff survey results

To support the formation of the Business Plan, Strata undertook a comprehensive survey of all officers within the three authorities. Strata received a very good response rate with nearly 500 users taking the time to complete the survey and provide a good level of constructive feedback. Strata will undertake a similar survey on an annual basis to track satisfaction and will also benchmark these results with other authorities. A summary of the survey results can be seen below:

- 475 responses is 26% of the userbase, so is a good representation of the authorities' view of Strata. This number excludes councillors and Strata staff. A follow up Survey will be undertaken specifically with councillors in mind.

- The graph below shows the split of responses across the three authorities. As can be seen there is a good participation rate within all councils. The percentage split of responses closely aligns with the partnership split, therefore it can be considered a good representation of the councils' views of Strata.

475
responses from

26%
of userbase

Teignbridge 129 27%
Exeter 177 37%
East Devon 169 36%
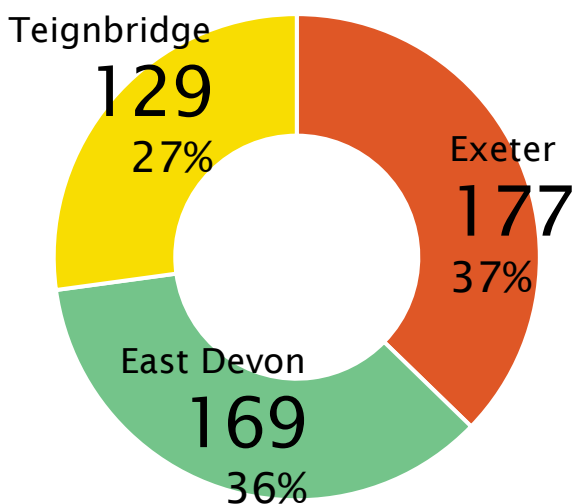
- 69% represents a good overall level of satisfaction with the level of service provision, however it does leave room for improvement, and this will be a focus of Strata over the next business plan period. Of the 475 responses received, the most common score out of ten was eight with only 13% of respondents awarding a satisfaction score of less than five.

- Feedback of various aspects of the Strata Service Desk provision was very positive, with only 5% of the respondents dissatisfied with the service provided. A frequent comment, however, was that the opening times didn't align with the councils' opening times. This is being addressed – See below.

- General satisfaction with the users' devices was also high with only 13% of users dissatisfied with their device.

- Strata also encouraged users to tell us how Strata can improve. A summary of the key responses can be seen in the table below along with how this Business Plan will address the suggestions made.

69%
overall satisfaction

95%
Positive or neutral overall satisfaction with Service Desk provision

Improve portal
57

Service Desk opening times
56

Improve comms (call updates)
40

Improve hardware
36

Audio visual
19

Improve Global Desktop
17

Improve prioritisation of requests
16

Skype for Business
8
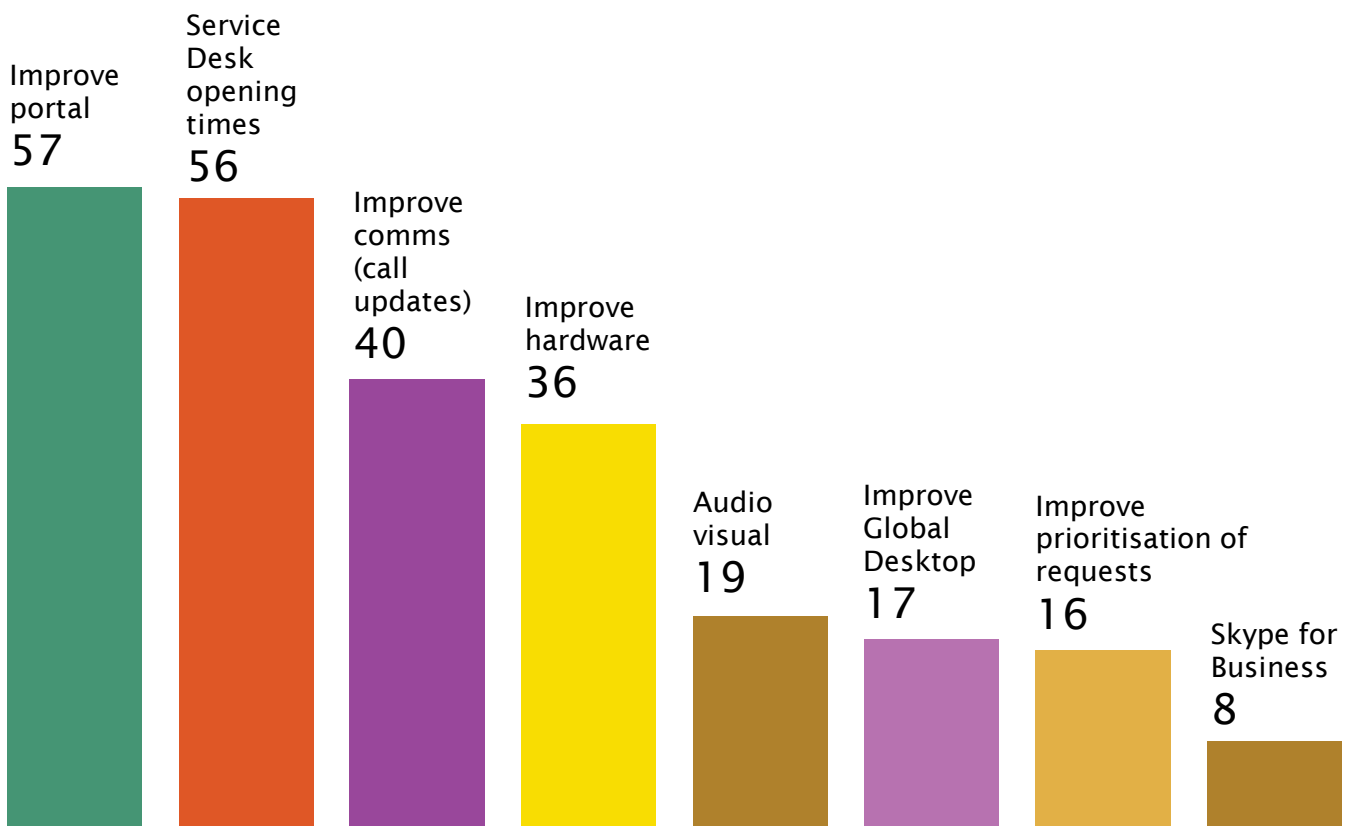
You said	We've listened	Business plan reference
Improve portal	Satisfaction with the portal is high, but there is more we need to do to make the categories easier to find. We're rewriting our Service Catalogue and introducing an A to Z of Services.	Section 3.3: IT service centre realignment.
Service desk opening times	From Jan '24 we're changing the opening times of the Service Desk to align more with service needs. Opening time will be 08:00 to 17:00 Monday to Friday. There will also be a single number to call.	Section 3.3: IT service centre realignment.
Improve comms – provide better updates to call progress	We're restructuring the Service Desk to ensure a dedicated member of Staff is responsible for managing incidents and service requests.	Section 3.3: IT service centre realignment.
Improve hardware and replace aging devices	We've included a hardware replacement strategy in the Business Plan that will replace the computers on a rolling basis, so that no laptop will be older than four years.	Enabler one: Introduce new end user computing model
Audio visual equipment in meeting rooms needs improving	We have several requests already logged with Strata to help the councils replace the aging Audio-Visual equipment in meeting rooms and will aim to complete this work in the new year.	Already underway – being worked on as a service request
Improve Global Desktop	A new end user computer model will be introduced which will enable users to access applications such as Office, Teams and cloud-based apps without having to log into the Global Desktop. Over time, more applications will be available directly on the device as we reduce reliance on the Global Desktop	Enabler one: introduce new end user computing model
Improve prioritisation of requests	We'll continue to work with the Client leads to provide any information needed to help the councils prioritise Strata's workload so that we continue to focus on areas most important to the councils. We'll also work with Client Leads to introduce 'Product Owners' for key council systems who can work with Strata to help prioritise.	The authorities are responsible for Prioritisation of Strata work; however, Strata have worked with the authorities to improve the governance.
Skype for Business is old	We will be replacing Skype for Business with Microsoft Teams during the 24/25 financial year and replacing the contact centre telephony platform (currently Anywhere 365) with a new system.	Enabler two: contact centre and telephony

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Having the right IT infrastructure and leadership in place is crucially important in helping any organisation plan for the future.

I was impressed when I recently heard Strata's vision and plans to meet the future needs of the council. The approach will enable us to continue a digital transformation that meets the expectations of our residents to access services in ways they want to access them.

— Phil Bialyk
   Leader for Exeter City Council

'
The introduction of new, agile ways of working and tools have improved how we manage and prioritise our ICT workload, collaborate with our Strata colleagues and work jointly across the three councils. With a renewed focus on data, Microsoft 365 and ICT infrastructure, the foundations are in place for more effective delivery of both business as usual and projects that will transform the customer experience and the work of our members and staff.

— Bruce Luxton
   Client Lead, Exeter City Council

'
On coming onto the board it was clear that Strata had a great track record at delivering the financial savings the council's originally required and that staff had worked relentlessly to keep all three council's operating during the challenges of the Covid-19 pandemic. It is now very exciting to see how the new leadership is looking to the future and is transforming the focus of the business to align with the council's digital transformation plans.

The ECC Digital Customer Strategy (2023–25) sets out how the council intends to deliver on an ambitious vision to provide excellent customer experience. We are under no illusion about the challenges we face but are increasingly confident that our partnership with Strata will enable us to utilise new and existing digital resources to deliver the essential business transformation.

— Jo Yelland
   Director, Exeter City Council (Lead for Customer
   and Digital Transformation)

'This new business plan is a really welcome step forward giving us a clear direction of travel on projects and a very comprehensive work programme for the year ahead which complements our own service priorities and financial sustainability plan.

We look forward to working with the staff at Strata and our partners in Exeter and Teignbridge to bring real transformative change to our council."

- Simon Davey (Director) and Andrew Hopkins (Client Lead) East Devon District Council.

1.3   A statement on artificial intelligence (AI)

The rise of artificial intelligence over the past few years has been dramatic, and in 2023 we saw the technology being openly discussed at an international level between world and technology leaders, with concerns over its social and moral implications alongside the potential that it brings to everyday life.

On 1 November 2023, Microsoft officially launched Copilot for Microsoft 365, and it has immediately changed what we think of the Modern Workplace.

Copilot takes the technology that has driven the already infamous ChatGPT (and Bing Chat) but imbeds it into all your Office products – Word, Excel, PowerPoint, Outlook. This allows, for example, to write PowerPoint presentations for you from content in a Word document, to summarise all the important unread emails, to schedule your work for the week based on your outstanding tasks. Within meetings it could automatically take notes, actions and summarise the entire meeting without any input from staff.

Microsoft are keen to point out this is not autopilot, it is not an automation technology to replace humans, but an assistant to help make us more efficient and productive in the workplace.

But Copilot is more than Microsoft Office, it is embedded into every major Microsoft application. It brings additional intelligence and insight to our performance, and it helps enhance our security and data governance. With Copilot Studios for example, Strata could potentially embed AI to legacy back-office systems via our enterprise middleware architecture (described later in this document). Indeed, Microsoft in November stated that they are now the Copilot company, they are extremely confident that this is future.

It is difficult to ignore this recent development, however there is a cost.

The cost per user, per month is £25.50, but there is a minimum headcount of 300. This means a minimum of £91,800 per year. Thankfully, as each of our partners and Strata are in the same Microsoft tenant, the cost can more easily be

shared. These costs have been included in the Business Plan as a pilot, as we believe this to be a solid platform for further cost reduction.

Strata believes that Copilot has the potential to bring near-immediate efficiencies to our partners and Strata itself, however with the technology still emerging, the business case is remains anecdotal and that potential remains just that … potential.

Although there are social and moral implications to this technology that are discussed in the wider world, and we can expect this discussion to continue for many years, we cannot ignore that artificial intelligence is here and it is here to stay.

Therefore, we must assume that artificial intelligence, perhaps with the Copilot technology, has a through line to every piece of work in this document.

2 How the business plan links to council strategies

The Strata business plan 2024/25 has been formed to deliver the key strategic goals of the three partner authorities set out in their digital strategies. The table below maps common themes to enables to allow partners to deliver on their goals.

Theme	Digital strategy	Common enablers
Increase customer self-service	**Exeter City Council** Digital Customer Service Strategy • A culture of and delivery of excellent customer and digital service • One Front Door - aims to make it easier for customers to get the information, advice, and • support from the council when they need it and in a way that works best for them. A joined-up channel • Understand the demand for council services and what can be moved onto a digital platform and • What still needs to be handled with human interaction. • Introduce a single view of the customer **East Devon District Council** **Digital Customer Service Strategy 2023–25** Financial Sustainability Model (FSM) • All Customers can use our online services • Website is accessible to All • Majority of customers can serve themselves online • FSM – Customer Access, Digitalising Services • FSM – Digital Transformation **Teignbridge District Council** Digital Customer Service Strategy 2023–25 • All Customers can use our online services • Website is accessible to All • Majority of customers can serve themselves online	• Enabler 3: customer platform • Enabler 4: Enterprise Middleware Architecture • Enabler 6: Bookings • Enabler 7: Notifications • Enabler 10: Web content and chat bot

Theme	Digital strategy	Common enablers

Single point of contact →

Exeter City Council
Digital Customer Service Strategy

- One Front Door – Customers can contact us easily via a single point of contact. Staff use joined up technology so they can view a Single Customer Record to handle the majority of customer enquiries, avoiding the need to hand off to others.

East Devon District Council and **Teignbridge District Council**
Digital Customer Service Strategy 2023–25

- Create a Single View of the Customer
- Customer Transactions are simple, Streamlined, automated and make optimum use of Technology.
- Majority of Customer enquiries are dealt with at the first point of Contact, either by professional advisors or an automated service.

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- Enabler 2: contact centre and telephony
- Enabler 3: CRM and Forms
- Enabler 4: Enterprise Middleware Architecture
- Enabler 3: CRM and Forms
- Enabler 6: Bookings
- Enabler 7: Notifications
- Enabler 10: Web Content and Chatbot

Enabling staff →

Exeter City Council
Digital Customer Service Strategy

- Streamline process, automating routine steps. Remove Paper transactions, Explore use of AI.
- Provide staff with access to continuously improving digital technology.
- Equip staff with the necessary digital skills.
- Provide equipment needed to perform.

East Devon District Council and **Teignbridge District Council**
Digital Customer Service Strategy 2023–25

- Equip staff with the necessary digital skills.
- Provide new devices.
- Introduce Microsoft 365
- Enable Mobile Officers to receive cases, input and update via mobile devices
- Implement Responsive and Resilient Infrastructure
- Review of IT infrastructure to ensure it is fit for purpose and replace outdated system and hardware

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- Enabler 1: End User Computing
- Enabler: four Enterprise Middleware Architecture
- Enabler 5: SharePoint
- Enabler 6: Bookings
- Enabler 7: Notifications
- Enabler 8: Power Platform

Theme	Digital strategy	Common enablers

Use of data →

Exeter City Council
Digital Customer Service Strategy

- Exeter will routinely analyse customer data and feedback and use these insights to inform how services develop.
- Be open and transparent and publish data and information.
- Data is organised and maintained in line with best Practice, we know where our business critical data resides and what is being done with it. The data is controlled and classified using technology.

East Devon District Council and **Teignbridge District Council**
Digital Customer Service Strategy 2023–25

- Build data services to bring insight directly to business areas.
- Improve access to reporting tools.
- Use data to inform decision making.
- Create and maintain well managed data

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- Enabler 9: Data and Data Warehouse

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Robust IT platform →

Exeter City Council
Digital Customer Service Strategy

- Fit-for-purpose ICT infrastructure and systems.
- Move from paper based to digital.
- Migrate to the cloud.
- Implement a strategy for protecting and managing sensitive and business critical data.

East Devon District Council and **Teignbridge District Council**
Digital Customer Service Strategy 2023–25

- Responsive and resilient Infrastructure.
- Optimise use of Cloud
- Modern flexible secure and integrated.
- Mobile Workforce.

→

- Server rationalisation
- Application rationalisation
- SaaS first for application
- Roadmaps for applications to cloud transition
- Enabler 1: EUC
- Enabler 2: contact centre and telephony

Theme	Digital strategy	Common enablers
Net zero	**Exeter City Council** Digital Customer Service Strategy • Links to Exeter's Net Zero City plan **East Devon District Council** and **Teignbridge District Council** Digital Customer Service Strategy 2023–25 • Make a tangible contribution to Net Zero commitments through innovative use of ICT. • Optimise the use of Cloud.	• Enabler 1: End User Computing

Strata has identified ten key enablers that are required to deliver the councils' digital aspiration. These enablers are key foundation components that can be used by Strata and the authorities to build the technical solutions needed.

The key enablers are:

> 2.1 Enabler one: introduce new end user computing model

> 2.2 Enabler two: contact centre and telephony

> 2.3 Enabler three: CRM and forms

> 2.4 Enabler four: Enterprise Middleware Architecture (EMA)

> 2.5 Enabler five: SharePoint

> 2.6 Enabler six: bookings

> 2.7 Enabler seven: notifications

> 2.8 Enabler eight: Power Platform

> 2.9 Enabler nine: data platform

> 2.10   Enabler ten: website content and chatbots

2.1   Enabler one: introduce new end user computing model

2.1.1   Description

A new end user computing model will be introduced which will enable users to work natively on their window laptop and will, in time, remove the need for VMware Horizon virtual desktops.

Users will have access to the Office 365 applications, including Outlook, Teams, and Skype for Business (until it is replaced), and their files in OneDrive and SharePoint without the need to logon to Global Desktop. Cloud-based systems and on-premises web-based solutions will also be available natively, but Global Desktop access will still be required to access on-premises business systems, at least within the next 24 months.

The new build will utilise Microsoft alternatives to third party products such as ESET for anti-virus, and SafeNet for multi-factor authentication. This will leverage more value for our Microsoft subscription and create savings from not renewing other software licenses.

This new end user computing model has been designed with hybrid working in mind and will give the same user experience whether working in the office or remotely. It will be more robust and improve resiliency as Office 365 is cloud-based and does not require access to on-premises systems in the council offices to operate. It will also be more agile, with the latest updates to Microsoft apps such as Teams installed automatically shortly after they become available giving access to new features more much more quickly.

To provide council staff with the best user experience, older end user devices will be replaced with new hardware as staff are migrated to the new model. We anticipate this to be 35% of the total laptop estate. Those with newer devices which have been replaced recently, will have those devices re-provisioned with the new laptop build.

It is assumed that the Copilot for Microsoft 365 technology will be included as part of this deployment, for those that are licensed for it.

2.1.2   Objectives

✔ To design a new laptop build to be deployed using Microsoft Intune providing native access to the Microsoft 365 suite of applications, without the need for Global Desktop.

✔ To utilise Microsoft AlwaysOn VPN to provide access to on-premises web-based systems, file shares and printers.

✔ To utilise Microsoft Multi-factor Authentication (MFA), in place of SafeNet, for secure access.

✔ Anti-virus and endpoint protection to be provided using Microsoft Defender in place of ESET Endpoint Security.

✔ Updates to the Windows operating system and Microsoft applications to be managed using Microsoft Autopatch with Intune.

✔ A review will be undertaken of the Microsoft stack to streamline the operation and leveraging the investment in Microsoft.

✔ To carry out a hardware refresh as part of the deployment, replacing older end user devices with new laptops that are pre-provisioned by the reseller using Microsoft Autopilot with Intune. This means that devices will be delivered pre-configured and ready for deployment enabling faster rollout to staff.

2.1.3   Assumptions

• Global Desktop access will be available within the new desktop build during the next 24-month transition phase and will still be required for access to many on-premises line of business systems. The requirement for this will reduce over time as systems migrate to the cloud (SaaS).

• To future-proof the estate, the replacement laptops will need to be of a higher specification than was previously required for the VDI build. This is because of the additional processing and memory requirement for running multiple applications natively on the laptop. It is assumed that around 35% of the laptop estate will need to be replaced initially, and then a rolling program of replacement established to ensure that end user devices remain fit for purpose.

- AlwaysOn VPN is a prerequisite and is due to be implemented in December 2023. At time of writing, it is assumed this will have been successfully implemented.

- Copilot for Microsoft 365 can only be included in this deployment if the licensing costs are agreed and will only be available initially on the native laptop, (not accessible within Global Desktop).

2.1.4   Dependencies

→ User accounts need to have been migrated to Microsoft 365 before individual users can be moved onto the new model. (TDC complete, EDDC due to be completed in 2023, ECC due to be completed in early 2024)

2.2   Enabler two: contact centre and telephony

2.2.1   Description

Replace Skype for Business and Anywhere 365 telephony systems across all four organisations. This will help, alongside work in the Web and CRM Enablers, to modernise and streamline the customer-facing elements of our businesses.

These systems are going end of life October 2025 so must be replaced in favour of cloud-based solutions.

Also impacted by the removal of Skype for Business is many physical handsets, a small number of audio-visual units and a DECT system that will all need to be removed\replaced due to the way they link into the existing telephony platform.

East Devon also has a webchat solution that can be replaced by an omni-channel contact centre.

2.2.2   Objectives

Telephony for council staff

✔ Replace Skype for Business with a new telephony solution.

✔ Decisions are still to be made on the technology used for telephony by the authorities, however it is assumed here that the core platform will be Microsoft Teams. This would be the natural successor to Skype for Business and has the best integration into the Microsoft 365 eco-system. This change will require an uplift on Microsoft licensing costs, which are presented elsewhere in this document.

✔ Currently every member of staff with access to a computer is also licensed for Skype for Business. However, it is possible that the authorities will want to reduce the number of staff with this functionality.

✔ We will also need to revisit every handset (used in meeting rooms, public spaces, and reception areas) as many are not compatible with Microsoft Teams. In some instances, we will need to refresh audio-visual equipment, however these are slowly being phased out anyway.

Contact centre

✔ Our current contact centre is directly tied into the core telephony of Skype for Business, so must be replaced as part of the same project as it also will go end of life in October 2025. Our version of Anywhere 365, the existing contact centre, has a unique licensing model within the industry – our license covers every employee. Due to this, the functionality of Anywhere 365 has been provided across many services within the authorities, where it was deemed necessary at the time of implementation. Any new product – including the replacement version of Anywhere365 – would be based on a per-agent basis and will drastically increase the costs over what is currently paid.

✔ The authorities will need to be much more selective over who gets the functionality for contact centre. Council strategy might dictate that the contact centres will be much larger than they are now to reduce back-office demand, and with the new solutions being on a per-agent basis there needs to be more control over where this functionality is deployed. This aligns with our partner views of creating single contact centres.

However, the new contact centre will also be omni-channel, meaning it will be able to provide additional services such as web chat and social media along with greater insight for demand and performance.

2.2.3   Assumptions

- That Microsoft Teams will be the core telephony provider. Other services are available from numerous providers, but Teams is the natural successor to Skype for Business and has the best integration into Microsoft 365. Costs for Microsoft licensing are explained and presented elsewhere in this document.

- For now, contact centre pricing is based on 200 agents, 25 supervisors and five administrators. Where possible, as many features as possible have been included in the licensing costs to present a 'worst case'. Prior to the formal tender for a new contact centre, we have undertaken a soft-market test to allow us to submit budgetary figures at a mid-point from the suppliers that responded.

- The number of physical handsets could be reduced following a review, but for now are based on the numbers remaining the same. Note that each handset requires a separate license cost, which is included in the Microsoft Licensing section. If the core telephony is changed from Microsoft Teams, then all the handsets might need to be replaced.

2.2.4   Dependencies

→ All staff must be migrated to Microsoft 365.

→ Integration into CRM/customer platform relies on there being an agreed customer platform.

→ Processes for omni-channel functionality such as web chat and social media need to be mapped or updated prior to implementation.

→ Authorities agree which roles require telephony and identify who requires contact centre.

→ Agreement for Teams telephony as the core platform across all organisations.

→ All organisations agree to the same contact centre solution.

→ Authorities have a rough idea of number of agents required, and if this exceeds the assumption stated then the costs will be higher than are presented here.

→ The authorities must have adequate resourcing in place to manage the project from a business side.

2.3   Enabler three: CRM and forms

2.3.1   Description

A customer relationship management (CRM) system is a powerful tool for centralising all interactions between our residents and the council. It helps streamline communication by channelling all contact, whether by phone, online, chat, email, or social media, through a single system. This in turn, enhances the customer experience by enabling customer services staff to answer more queries at the first point of contact, which reduces the administrative overhead on back-office specialists, allowing them to focus on the work that requires a greater level of expertise or attention.

By channelling data in this way, it's possible to create a 'Single View' of the customer, which enables the councils to understand all contact a customer makes and will build a picture of what services all our customers require.

The diagram that follows shows the wider concept of the entire customer platform required to deliver the councils' objectives and how the CRM fits into this. As can be seen it is envisaged that all customer contact, whether via self-service, or via a customer service agent or back-office expert will go via the CRM. This enables the contact to be logged and associated with the customer. Any required integration with a back-office system will be handled via the enterprise middleware architecture (EMA). All Notifications to customers will be facilitated via the notification engine, and reporting on customer behaviour will be facilitated by the data warehouse.

It is assumed that the incumbent CRM will fulfil the requirements defined by the council and therefore will not be needed to be replaced. The costs for which have been excluded from this business plan. (Included in Appendix A)

Enabler 8
Process automation tool

Back office systems (for example, planning, finance, etc)

Enabler 5
Documents

Enabler 4 Strata case event listener

Enabler 7
Notification engine: WhatsApp, GOV.UK Notify, Synertec, GovDelivery

Enabler 4 Strata API management layer

Unmatched customers

National portals: Planning Portal, GOV.UK, Devon Home Choice, etc

Enabler 3
CRM: customers using MyAccount, forms workflow, omni channel

Enabler 9
Data warehouse: customer/ case cross-reference table

Customer

CSA

Back-office user

Analytics

2.3.2   Objectives

Increasing customer self-service and creating a single point of contact (also referred to as 'one front door') for customers are key goals of all three councils' digital strategies. The CRM will achieve this by:

- ✔ Implement single custom-centric process across-council contact centre to capture customer details and optimise performance.

- ✔ Using Online forms and processes to gather the correct information from a customer, needed to successfully complete their engagement.

- ✔ Creating forms that can be used by both council staff and customers to capture information in one place.

- ✔ Use workflow to automate work wherever possible.

- ✔ Integrate with back-office systems to reduce or eliminate rekeying of information.

- ✔ Link customer transactions with a customer record, so that customer requirements can be better understood and enable the authority to make better use of data to improve service delivery.

- ✔ Create a customer self-service account to enable the customer to view most interactions with the council in one place, to be able to see the progress of requests without contacting an officer and to be able to check balances with services such as Council Tax.

- ✔ Link to third party supplier portals using a single customer username and password, so that customers only need to

- ✔ Creating a centralised change of details process, so that customers need only tell us once about changes to their name, address, or other contact details.

- ✔ Enabling the council to proactively notify the customer of information relevant to them, thereby reducing the need for the customer to contact the council.

- ✔ Future-proof council architecture for any future changes.

2.3.3   Assumptions

- The current CRM in place across the three authorities is fit for purpose and will deliver the technology required to deliver the authority outcomes.

- That the three authorities will work in similar ways, so that the Customer Platform only need be created once and not bespoke for each authority.

- The authorities have the resource required to adequately support the process of form creation and will adopt similar practices for recording the customer journey.

- The data captured within the CRM will be of a high quality and will be maintained as such.

2.3.4   Dependencies

➜ **Enabler two: deliver new unified communications**
This will enable incoming telephone calls to automatically launch the customer record in the CRM.

➜ **Enabler four: enterprise middleware architecture**
This sits between the CRM and the back-office systems. It creates a single interface to update back-office systems and listen for status changes in cases held in back-office systems.

➜ **Enabler six: bookings**
This will enable customers and council staff to book assets such as rooms, sports pitches, timeslots, and equipment.

➜ **Enabler seven: notifications**
This will manage all notifications, with customers, such as text message, email, newsletter, and post.

➜ **Enabler nine: data platform**
Good quality data, linked via a unique customer reference is key to understanding customer behaviour.

➜ **Enabler ten: web – chatbot and content**
To reduce staff effort to support customers, the introduction of chatbots will be considered. To support this, good quality content on the website is essential.

2.4   Enabler four: Enterprise Middleware Architecture (EMA)

2.4.1   Description

A key dependency of the customer platform is the enterprise middleware architecture (hereafter referred to as 'middleware'). Middleware is a technology that manages the communication between the CRM and back-office systems. It reduces the technical debt needed to integrate these systems, allows Strata to check for errors and add additional security. It also benefits the authority staff by enabling specialists within the council to integrate systems, without the reliance on Strata staff. It will also listen for changes to cases held in back-office systems and update the CRM and customer with the progress of the case.

2.4.2   Objectives

- ✔ Reduce the complexity of managing integrations between different systems.

- ✔ Standardise the method of integrating systems.

- ✔ Give council staff the ability to use pre-built integrations especially when using Power Apps, Power Automate, and Developing GovService forms, without Strata involvement.

- ✔ Reduce the time it takes to integrate systems.

- ✔ It will create a managed environment, meaning individual systems that use the Middleware for Integration can be swapped out and replaced without having to re-develop the forms and processes that feed into the new system.

2.4.3   Assumptions

- A mixture of technologies will be used to create the components of the Middleware. Some will be paid for, some will be open source, some will be developed by Strata.

- Where commercially available components are used, a budget assumption has been made and included in the cost section.

2.4.4   Dependencies

➔ Many of the APIs included in the API layer (see below) are supplied by third parties. Strata is dependent on the capabilities of these APIs and can only update or retrieve data from third party systems where the API allows.

2.4.5   Deliverables

The middleware will consist of the following components. Whilst this is a level of technical detail, it is important to set out within the business plan our aspirations, to be ratified by the technical design architect (TDA). How these fit together can be seen in .

- ✔ Load balancer: this will ensure the traffic through the middleware doesn't get caught in a bottle neck. It is likely Strata will use a Microsoft Azure service to load balance the middleware.

- ✔ API gateway: this is the entry point to the Middleware. It ensures only secure traffic can use it.

- ✔ Message queuing: at busy times, or if a back-office system is unreachable for any reason, the traffic through the middleware will be queued, and can be processed later once the back-office system becomes available. This ensures data isn't lost.

- ✔ API layer: this is a managed collection of APIs, either developed by Strata or provided by a third party and is the mechanism by which the traffic is placed or retrieved from back-office systems.

- ✔ Error logging: when errors do occur, these will be logged so that faults can be corrected.

✔ Auditing: full audit log of the traffic through the Middleware.

✔ Security: secure by design.

This diagram shows the logical dataflow of our intended vision for the Enterprise

Middleware Architecture platform:
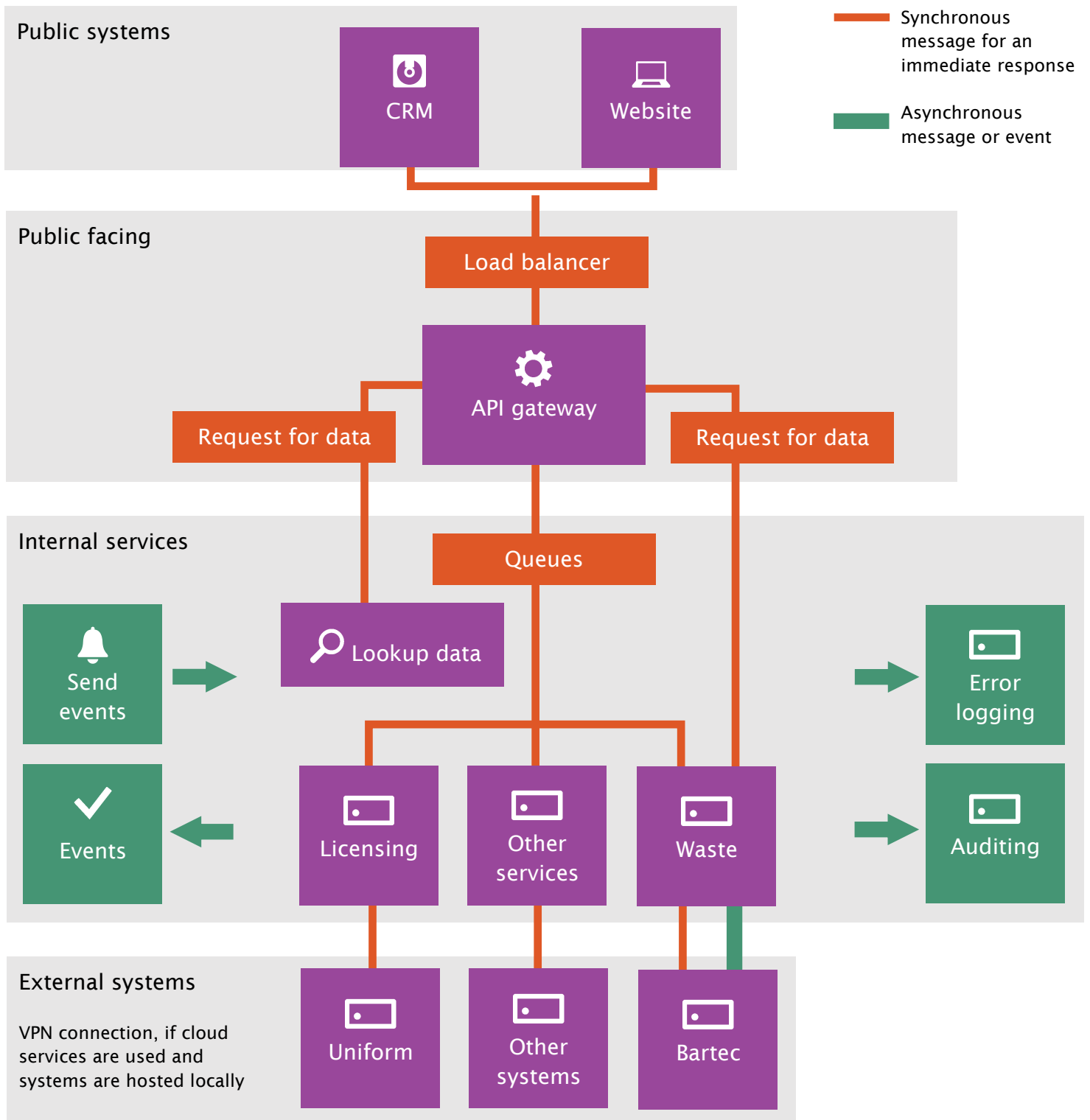
2.5   Enabler five: SharePoint

2.5.1   Description

Document storage, retrieval and collaboration are key requirements to deliver the councils' digital goals. SharePoint is the chosen platform for this. To leverage the benefits, it must be designed properly to ensure documents are easily searchable, secure access, and the full document lifecycle from creation to disposal can be properly maintained.

The three authorities are currently at slightly different starting points, the intention is for all partners to migrate structured and unstructured documents into single searchable repository that encompasses document retention, business classification and security.

Strata will also work with the councils to incorporate into the SharePoint and Teams design a standardised offering for councillors document storage, access, and collaboration, in line with council policy and government guidelines.

2.5.2   Objectives

✔ A well-structured and maintained document storage facility.

✔ Documents that can be quickly found and retrieved.

✔ Documents that are secure and can only be accessed by staff with appropriate permissions.

✔ Documents that have a managed lifecycle, from creation through to disposal.

✔ Over time, SharePoint becomes the de facto document storage repository for all documents.

✔ That the authorities adopt a common SharePoint design architecture, whilst allowing for local differences where needed.

✔ Reduction of on-premises data storage in-line with our cloud strategy.

2.5.3   Assumptions

- A single tenant is adopted.

- Appropriate Microsoft licensing that includes the compliance features.

- Estimated costs for a project manager included in costs.

2.5.4   Dependencies

→ Successful completion of the current design document with all requested input from the authorities.

→ Microsoft compliance features are required to use many of the tools necessary to successfully manage the SharePoint environment. This is explained in the Microsoft licensing section.

→ Adequate resource from the authorities to undertake this piece of work, in recognition of all the change that is taking place.

2.5.5   Deliverables

✔ Design document detailing:

     o Common SharePoint architecture used across the three authorities with the ability to have local changes as needed.

     o A business classification system for documents stored in SharePoint.

     o A data retention schedule

     o Permissions plan to ensure only correct staff can access the documents.

✔ A costed implementation plan to build the new SharePoint structure.

✔ Implementation of the SharePoint structure

✔ Migration of data from existing repositories into the new SharePoint structure.

2.6   Enabler six: bookings

2.6.1   Description

Many of the processes and transactions that occur in the authority involve the booking of an asset, whether that is a room, equipment, time slot or playing pitch. To improve these transactions, a booking solution is required.

This chosen solution should be able to integrate with existing systems, so that it can be embedded within forms, processes, and the website. The system should also be usable by council staff, avoiding a reliance on Strata to embed within council systems.

Preliminary investigation has identified several potential solutions; however, the cost and functionality vary widely. A well-known solution, for example, Booking Lab, would cost in excess of £100,000 per year per authority, whilst other solutions are free at the point of use (MS Bookings).

The project to introduce a booking solution will first begin with understanding use cases from the councils, with several already known. After which an investigation into potential solutions with a final phase of implementation and adoption. It is possible that a variety of solutions will be required to meet the large number of potential use-cases.

2.6.2   Objectives

✔ Understand and document council requirements of a booking system.

✔ The system should be flexible enough to be suitable for a range of booking requirements.

✔ The system should integrate with a range of council systems.

✔ The solution should be usable by council staff and Strata alike.

✔ The cost of the solution should be commensurate with the use cases.

2.6.3   Assumptions

- More than one booking system may be required to fulfil the various use-cases across the authorities.

2.6.4   Dependencies

➔ Must be compatible with the new Strata enterprise middleware architecture and customer platform.

2.6.5   Deliverables

✔ Booking system able to be embedded within council systems and usable by both council staff and Strata staff.

2.7   Enabler seven: notifications

2.7.1   Description

Most transactions that occur require some sort of notification, whether to notify staff within the authority or customers. These notifications can be email, text message, letter, or even WhatsApp. A notification engine will simplify the creation and management of these notifications, enabling the authority staff to embed these into processes themselves, while at the same time making it easier for Strata to manage.

2.7.2   Objectives

✔ Notification 'engine' that can accept a common set of instructions, regardless of the method of notification used. For example, regardless of whether the notification will be a text message or email, the user can use a common interface to input the message, chose the method and the message will then be sent.

✔ Future-proof so our partners can quickly implement emerging communication channels.

2.7.3   Assumptions

- The notification 'engine' is not a replacement of existing social media management tools, such as Orlo.

2.7.4   Dependencies

→ Good quality, maintained and current, contact data within the CRM.

→ Enabler 4: enterprise middleware architecture

➜ Enabler 2: telephony and contact centre

2.7.5   Deliverables

✔ A centralised notification 'engine'.

✔ A common interface for all notifications.

✔ Solution can embed within existing processes and systems.

2.8   Enabler eight: Power Platform

2.8.1   Description

The Power Platform is a suite of low-code tools from Microsoft that enables users to create applications, automate workflows (or 'flows'), analyse data, and build chatbots. The Power Platform consists of four main components: Power Apps, Power Automate, Power BI, and Power Virtual Agents. These components can be used individually or together and can integrate with other Microsoft products such as Office 365.

There are two ways of licensing Power Apps and Power Automate:

Standard license
Free

- Apps and flows are stored in OneDrive or the default environment.

- No controls in place

- Can only be used by the person who created them.

- Once the person leaves the organisation the app/flow will be removed when their profile is deleted.

- Restrictions on functionality – no 'premium features' such as database integrations

- Basic amount of storage.

Premium license
Power Automate: £132 pp/year
Power Apps: £175 pp/year

- Apps and flows can be saved in different environments – for example. development, test, production, which mirrors more professional development principles.

- Enterprise controls, such as security controls and usage statistics can be put in place via Centre of Excellence.

- Greater functionality available – for example, integrations with SQL server and other databases.

- Apps and flows can be used by other staff, as long as they also have a premium license.

- Apps and flows remain with the organisation and persist even if the person who created them has left.

- 5,000 AI builder credits included.

Both license types described above allow an automation to be run in 'attended mode', which means that a user has to be actively logged in for the process to start. If the requirement is for the automation to run when the user is not active (in 'unattended mode'), for example overnight, an additional license is required per automation. This is currently £123.30 per automation per month.

Some functionality such the use of artificial intelligence capabilities, also requires an additional license, on top of the premium license. The AI capability is licensed on a per use basis, meaning the more calculations the AI performs the greater the cost. As such it's not possible to provide a cost here.

Strata has included a budget for three Power Automate premium and three Power Apps premium licenses per authority within the business plan. This will enable a core set of users to begin to understand the capabilities of the Power Platform and build the initial set of apps and flows. It is suggested that the authorities then create a business case for further expansion of the user of Power Automate and Power Apps.

2.8.2   Objectives

- ✔ To empower users to create solutions that meet their business needs without relying on Strata or external developers.

- ✔ To leverage the capabilities of the Power Platform to enhance existing systems and processes, and to enable new digital services.

- ✔ To establish a governance framework for the Power Platform to ensure security, compliance, and quality standards are met.

- ✔ To provide training and support for users to develop their skills and confidence in using the Power Platform.

2.8.3   Assumptions

- That Microsoft's Power Platform is the low-code development platform of choice adopted by the councils.

- That the councils have the appropriate Microsoft licensing to access the Power Platform features and integrations.

- That the councils have the resources and willingness to adopt the Power Platform and to support the users in creating solutions.

2.8.4   Dependencies

➔ **Enabler four: enterprise middleware architecture**
This will enable the Power Platform to connect with various back-office systems and data sources.

➔ **Enabler nine: data platform**
This will provide a unified and governed data layer for the Power Platform to access and analyse data.

➔ **Enabler ten: web content and chatbots**
This will enable the Power Platform to create web-based solutions and chatbots that can be embedded in the council websites.

It should be noted that all dependencies do not have to be in place before the Power Platform and tools can be utilised by the councils. The power platform can be used independently of the above, but certain outcomes the authorities may want to achieve, such as automated routing for authorisations, and linking to back-office systems, will be better facilitated if the enablers to achieve those are in place.

2.8.5 Deliverables

✔ A Power Platform Centre of Excellence that will provide guidance, best practices, templates, and support for the Power Platform users and solutions.

✔ A Power Platform environment that will host the Power Platform solutions and integrations, and that will be monitored and managed by Strata.

✔ A portfolio of Power Platform solutions that will be created by the councils and Strata to address various business challenges and opportunities.

2.9   Enabler nine: data platform

2.9.1 Description

Data is key to achieving the outcomes identified by the councils. As such a robust data platform is needed to support the use of data and ensure its managed correctly.

The data strategy identified five pillars to successful data use. They are:

- Good data governance
- Accurate, good quality data
- Staff capability and training
- Technology
- Data sharing and collaboration policies.

One of the first steps in achieving good data governance is to understand what data the authority has and who is responsible for it. With the many thousands of datasets held by each authority, manually keeping track of these would be a mammoth, resource intensive endeavour. The reduce the effort needed to achieve this, Microsoft has a suite to tools available, to discover, track, and help manage data. One of the key products is Purview.

Purview is an umbrella term for the data management tools available from Microsoft. Many of the tools are included in the compliance centre, which has been costed separately in Section. The data governance aspects of Purview described in this section relate to the discovery and cataloguing of our data estate, which is fundamental to successful data governance and has been detailed extensively in the data Strategy.

Microsoft Purview governance portal is charged on a pay-as-you-go model and is dependent on the frequency of scans and volume of data scanned.

This diagram shows Microsoft's high-level view of Purview's governance portal:
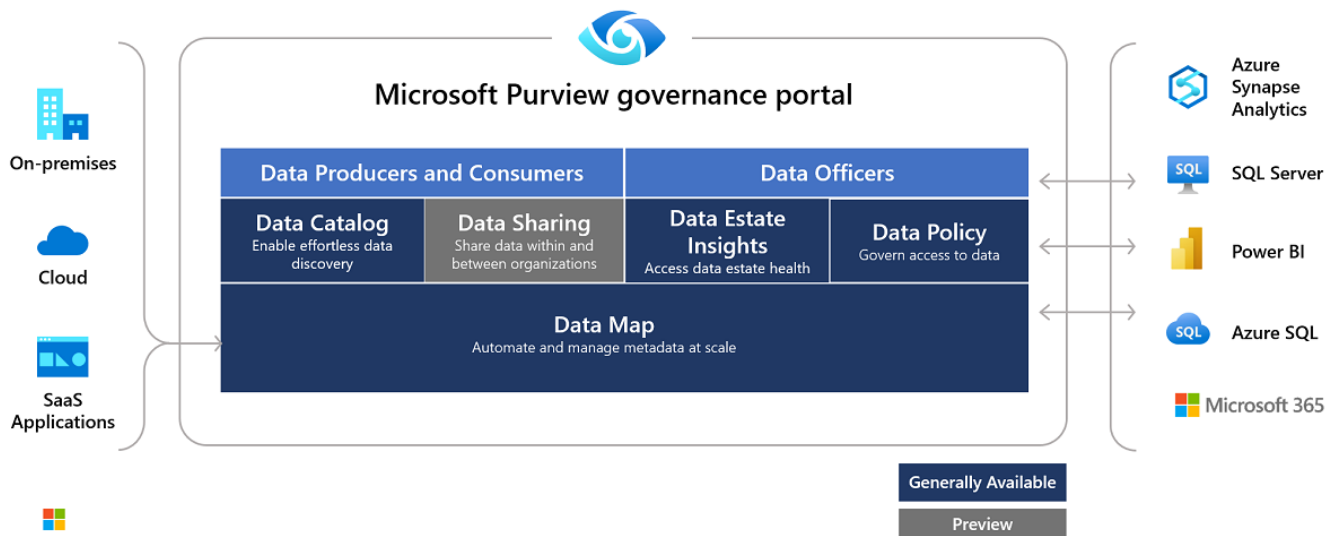
2.9.2 Objectives

The key objectives of the data section are:

- ✔ Implementation of sound data governance.

- ✔ Good data quality, including data standards and master datasets.

- ✔ Appropriate technology to support the authorities' data requirements.

- ✔ That staff are trained and have a good level of data awareness.

- ✔ A plan is in place to share and collaborate with third parties where appropriate.

2.9.3   Assumptions

- The councils have the appropriate Microsoft licensing to access the Purview system for Data Governance, including the Microsoft 365 E5 licensing, which includes the data compliance suite.

- The councils have the resources and willingness to adopt and manage data governance across each service.

2.9.4   Dependencies

→ **Microsoft Licensing:** This will enable the councils to access the appropriate technology to help catalogue and manage data.

→ **Shared Data Strategy:** A commonly agreed data strategy across each partner.

→ **Enabler five: SharePoint:** Technology that will support the data strategy implementation.

Note that work for the Data Platform can commence prior to SharePoint being implemented, but SharePoint is required to gain many of the benefits.

2.9.5   Deliverables

✔ A data catalogue for each platform, identifying where data is, what it is and who the data owners are.

✔ A common shared data strategy for each partner ensuring that all staff are trained and have a good understanding of data maturity.

2.10 Enabler ten: website content and chatbots

2.10.1 Description:

The website content and chatbots enabler aims to improve the quality, accessibility, and relevance of the partner authorities' websites and digital services. The enabler consists of two main components: website content and chatbots.

Chatbots

A relatively modern advancement in web technology is the chatbot. A chatbot can be thought of as a virtual customer services assistant. It can respond to queries from a customer and answer basic questions and complete basic tasks. This removes the need for an experienced human customer service advisor dealing with these basic tasks and frees them up to handle more complex cases.

There are two main types of chatbots:

- **Rule-based chatbots**
  These bots follow pre-defined rules and decision trees. They can provide responses based on specific keywords or patterns in user input. Rule-based chatbots are limited to the rules programmed into them and may struggle with understanding more complex or varied language.

- **AI-powered chatbots**
  These bots use AI and machine learning to improve their ability to understand and respond to user inputs. They can learn from interactions and adapt over time, making them more flexible and capable of handling a wider range of conversations.

Chatbots are commonly used on websites, messaging platforms, and mobile apps to engage with users, answer queries, and perform tasks. They play a significant role in enhancing customer experiences and streamlining communication processes.

To benefit most from AI-powered chatbots, the councils will require well-structured data on their websites. This will bring multiple benefits, both with the introduction of chatbots, and for the more traditional website interactions.

Website content

Good website content is accurate, engaging, and relevant to the target audience, and each of the partner websites need to be streamlined to help direct customers to the right information as quickly as possible,

The websites should be easy to read and understand, free of jargon, and well-organized. It should also be optimized for search engines and comply with accessibility standards. It can also help to improve search engine optimisation (SEO) and analytics, making it easier for people to find and engage with the authority website.

Whilst Strata is not responsible for the website content, it is critical to the success of the digital transformations the authorities require.

2.10.2   Objectives

✔ To enhance the user experience and satisfaction of the partner authorities' websites by providing clear, concise, and up-to-date information and services.

✔ To increase the accessibility and inclusivity of the partner authorities' websites by complying with the Web Content Accessibility Guidelines (WCAG) 2.1 AA standards.

✔ To improve the SEO and analytics of the partner authorities' websites by using best practices and tools such as Google Analytics, Google Search Console, and Bing Webmaster Tools.

✔ To provide chatbots that can assist users in finding information, completing transactions, and resolving issues in a timely and efficient manner.

✔ To ensure that the website content and chatbots align with the partner authorities' digital strategies and priorities, and that they are regularly reviewed and updated based on user feedback and analytics.

2.10.3   Assumptions

- That the partner authorities have the appropriate content management systems (CMS) and hosting platforms to support the website content and chatbots.

- That the partner authorities have the resources and willingness to create and maintain the website content and chatbots.

- That the partner authorities have the necessary data and insights to measure and report on the performance and impact of the website content and chatbots.

2.10.4   Dependencies

➔ **Enabler one: end user computing**
This will ensure that the partner authorities' staff have the necessary devices, software, and training to create and manage the website content and chatbots.

➔ **Enabler four: enterprise middleware architecture**
This will enable the website content and chatbots to connect with various back-office systems and data sources.

➔ **Enabler nine: data platform**
This will provide a unified and governed data layer for the website content and chatbots to access and analyse data.

➔ Staff resource from the authorities to help review and manage the chatbot, review responses to ensure it is delivering the correct replies.

2.10.5   Deliverables

✔ A website content strategy that will define the target audience, goals, themes, tone, style, and governance of the partner authorities' websites.

✔ A website content plan that will outline the content types, topics, formats, and owners of the partner authorities' websites.

✔ A website content audit that will assess the quality, accuracy, completeness, and compliance of the partner authorities' websites.

✔ A website content improvement plan that will prioritise the areas of improvement and the actions required to achieve them.

✔ A chatbot strategy that will define the scope, goals, use cases, design, and governance of the partner authorities' chatbots.

✔ A chatbot plan that will outline the chatbot types, topics, flows, and owners of the partner authorities' chatbots.

✔ A chatbot audit that will assess the quality, accuracy, completeness, and compliance of the partner authorities' chatbots.

✔ A chatbot improvement plan that will prioritize the areas of improvement and the actions required to achieve them.

3   Organisational enablers

3.1   Restructure and organisational change

In response to the ever-evolving demands and challenges of the Information and Communication Technology industry, Strata has embarked on a strategic staff restructure to enhance our capabilities and streamline our services. The cornerstone of this transformation is the establishment of two distinct and specialised teams: the 'technical design tower' and the 'service tower'.

This restructure is designed to empower us to better serve our partners, optimize our operations, and drive innovation in design and process within our organisation and partners.

This is a diagram of the new management team structure:
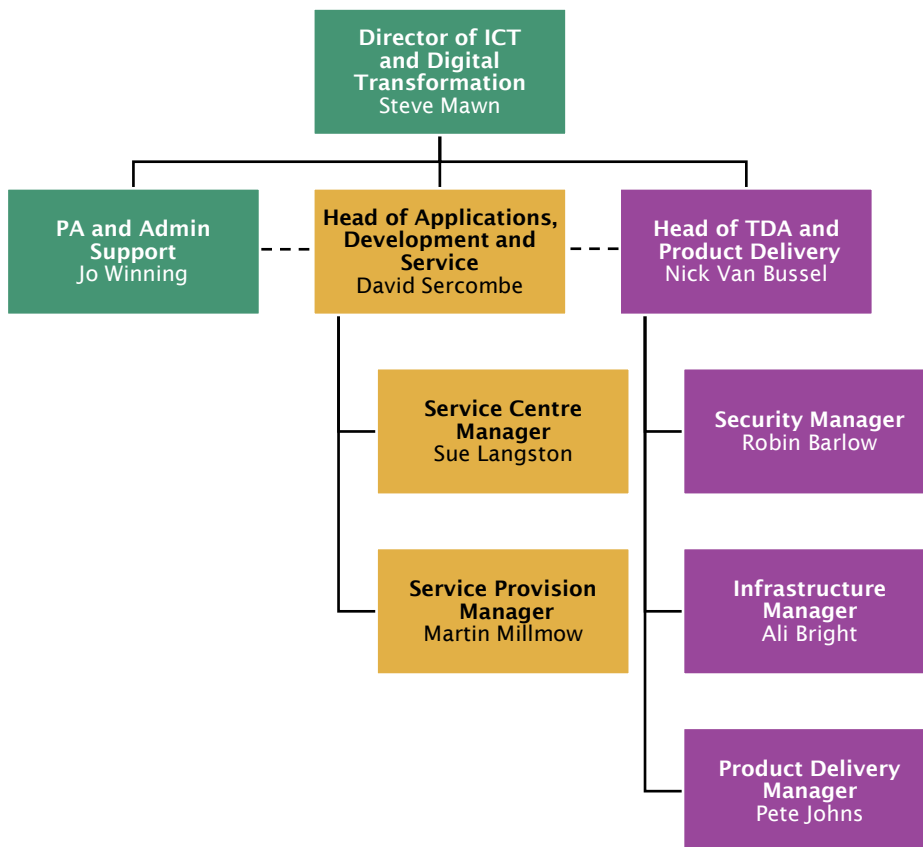
3.1.1   Objectives

The TDA tower (technology, design and architecture)

- ✔ To ensure all solutions are designed within the overall enterprise architecture.

- ✔ To provide a dedicated focus on infrastructure development and management.

- ✔ To ensure the highest standards of security across our systems and networks.

- ✔ To enhance the delivery of projects with a sharper emphasis on efficiency and quality.

- ✔ Deliver against Sla's

The service tower

- ✔ To establish an efficient and responsive service centre, specifically catering to our clients' needs.

- ✔ To monitor and act on service performance in line with SLAs, etc.

- ✔ To elevate our application development and management capabilities.

- ✔ To maintain a seamless and effective service delivery process.

- ✔ Develop and ensure continual improvement against ITIL.

3.1.2   Deliverables

The expected outcomes of this staff restructure include:

- ✔ Clearly defined roles and responsibilities for team members within the TDA tower and the service tower.

✔ Improved infrastructure management, security, and project delivery within the TDA tower.

✔ Enhanced service centre efficiency, application development, and streamlined service delivery within the service tower.

3.1.3   Costs and resources

While the financial implications of this restructure are included in the 'costs and resources' section, it is important to note that this transformation requires investments in new posts, additional support services and training which has been partly offset by post reductions in other areas.

3.2   ITIL process review

3.2.1   Description

ITIL, which stands for 'Information Technology Infrastructure Library', is a set of best practices for IT service management (ITSM). ITIL provides a worldwide recognised framework for organizations to deliver IT services that meet the needs of their customers.

ITIL is a valuable resource for organisations that want to improve their IT service delivery. It can help organizations to:

- Reduce costs: ITIL can help to identify and eliminate waste and inefficiencies in existing IT processes.

- Improve efficiency: ITIL can help to automate IT processes and to make better use of their existing resources.

- Improve quality: ITIL can help to deliver IT services that meet the needs and demands of their customers base.

- Improve customer satisfaction: ITIL can help to improve the quality of IT services, which can lead to increased customer satisfaction.

Whilst a number of processes are already being followed from this methodology and framework a further review is needed to both ensure they are fit for purpose but also to improve and to re-align to service and business demands. Alongside this implementing specific new key processes that are not currently in place and will ultimately improve the IT service offering from Strata.

3.2.2   Objectives

To review, improve existing and create new ITIL processes including:

- ✔ Incident management

- ✔ Service request fulfilment

- ✔ Service level agreements (SLAs) and reporting

- ✔ Problem management

- ✔ Change management

- ✔ Service asset and configuration management (SACM)

- ✔ Service catalogue

- ✔ Service Desk

3.2.3   Assumptions

- To continue to use the existing Alemba - ASM core product (IT Service Desk toolset) for IT service management and related IT self-service portal.

- All existing Strata support teams will adopt and adhere to any new approved process and/or service changes.

3.2.4   Deliverables

- ✔ **New SLAs**
  New standardised incident and service request SLAs created with specific priorities and measurements set. These will be reported on internally as measures against service provision and aligned to other organisations to ensure comparisons are available.

- ✔ **Internal communication**
  Procedural updates for SLA changes implemented within Strata and communicated to customer. Report suite created for publishing and monitoring results.

✔ **Service catalogue**
Service catalogue and service descriptions created for all support elements. This will define what is and isn't provided under the contract. A to Z of IT Services published on IT Self Service signposting users to details and availability and any relevant support options.

✔ **Problem management**
New problem management policy, process and procedure created and implemented ensuring problems and impending issues are managed and detected avoiding service issues and disruption.

✔ **Business critical services**
As a dependency of the service catalogue business critical services identified and agreed with customer enabling strategy alignment on service continuity, disaster recovery planning and Out of Hours Support.

✔ **IT self-service portal updated**
Updating the IT self-service portal to align to service catalogue, better signposting to services and new SLAs/priorities.

✔ **Asset management**
Continue work to have a complete asset register and greater update automation for device changes within the organisations and estate.

3.3   IT Service Centre (Service Desk) realignment

3.3.1   Description

The IT Service Centre or IT Service Desk is the central and focal point for staff to seek support and help for all IT issues and requests. Strata is committed to service improvement and offering best value.

The current provision although performing well has evolved to changing requirements and demands which has in turn created inefficiencies and made it increasingly difficult to manage and deal with work volumes.

A review and re-alignment of the IT service desk, its staff and function will improve turnaround and resolution times.

3.3.2   Objectives

✔ To improve the customer experience for the IT service desk opening times and availability to suit the business needs and improve customer experience.

✔ Standardise and document the service, support, and the communication channels. To centralise process where possible and remove single points of failure.

✔ Linking to ITIL review work a published service catalogue and A to Z of IT services.

✔ Maximise new structure arrangements to ensure standardised improved service.

3.3.3   Assumptions

- There will be no changes in operating levels of staff but will adjust and align resources to fit new working patterns and process changes.

- There will be no direct impact or inconvenience to customers whilst changes are made and will be fully communicated.

3.3.4   Deliverables

✔ Change the service desk physical opening times to 8am to 5pm, Monday to Friday (excluding public and bank holidays). This will be when actual phone agents and support staff are available. (Self-service will remain available to log requests 24/7, 365.)

✔ change existing local number to single non-geographical telephone number (for example, 02). Communicate and update all areas where number is published. A redirect will be put in place as well.

✔ Increase service options available via self-service portal.

✔ Update the pre-recorded details when you call the service desk (IVR messaging) to signpost new changes.

✔ Review the existing 'reasonable endeavours' out of hours support arrangement and formalise an agreed service to align to critical business systems with a new dedicated phone number.

✔ Internal support teams and service desk toolset re-configured to align to new first-, second- and third-line structure for call triage.

✔ Create pre-8am scheduled checklists for support staff to ensure key business and critical systems are running as required before service desk opens.

3.4   Growth strategy

3.4.1   Description

The initial objective of Strata's business case was to strengthen its partners' ICT Departments by increasing resilience and expediting transformation. In recent months, significant efforts have been made to enhance these aspects, and the partners collectively acknowledge the successful achievement of these goals. Strata continues to prove its success and capability in delivering the priorities of its partners.

As part of the 2024/25 business plan, it is advisable to thoroughly assess additional opportunities on a case-by-case basis to identify potential areas of symbiotic benefit with existing or external partners.

To facilitate the partnership in evaluating potential opportunities, we plan to establish principles that shareholders will use to assess propositions throughout the 2024/25 period. These principles will serve as a foundation for evaluating any future partners, customers, or functions to be considered for inclusion in the future.

3.5   Print and post/Document Centre

3.5.1   Description

The discovery phase of a possible future project will take place to assess Document Centre services, this will involve collecting and reviewing information about current services, the current challenges faced and assess these factors against the future needs of the councils. For example, paper in circulation continues to decrease both internally and externally, printing needs have become more about having access when required and less about capacity to produce volume, this phase will examine these figures and trends and look to future needs.

3.5.2   Objectives

- ✔ Produce business case to support re-evaluated service design in line with discovery phase.

3.6   Branding

3.6.1   Description

In a strategic move aimed at aligning with the dynamic landscape of the digital age and bolstering its growth strategy, Strata is intending to rebrand.

This initiative involves a significant departure from the conventional black logo, symbolizing a transition towards a more contemporary and forward-thinking visual identity. The design will encapsulate the essence of innovation and progress, embodying the company's commitment to staying at the forefront of technological advancements. The choice of vibrant and modern elements in the revamped logo reflects the company's vision for the future, highlighting its dedication to adaptability and responsiveness in the ever-evolving realm of information and communication technology.

This rebranding effort not only serves as a visual renaissance but also signifies a strategic shift from the old to the new.

3.7   Digital Collaboration Forum

3.7.1   Description

As we introduce new technologies, new ways of working and new concepts, it is imperative that Strata has good communication and feedback within directly across multiple services and each partner.

A Digital Collaboration Forum is a group of nominated staff from each authority (preferably one person from each business area, per authority) to work together and with Strata as we introduce changes to technology. This is also a great way to help with communication to the wider audience, and the members of the Digital Collaboration Forum would cascade information out to their own departments. Also, this forum would facilitate closer working between the partners as we begin to share learning, opportunities, and issues.

The Digital Collaboration Forum would:

- ✔ Explore technologies such as Power Apps and Copilot for Microsoft 365 and share successes to the group.

- ✔ Explore opportunities within Microsoft 365 and share successes to the group.

- ✔ Be part of the Strata 'test' desktop releases, meaning these staff would receive the latest updates prior to the rest of the business.

- ✔ Give Strata a forum to share new developments and change coming to systems, especially 'evergreen' cloud-based systems.

- ✔ Cascade information to the wider businesses.

A similar forum has already been setup in Teignbridge and has been running for a nearly two years, which was branded Digital Tribe. The Digital Collaboration Forum will be an enhanced version of this extended to each partner, as a single entity.

In addition to this local Digital Collaboration Forum, we would also be working with the partners to engage further into the Microsoft Collaboration Forum. This is a national initiative across government bodies, working with and exploring Microsoft technologies to share ideas, problems, and solutions in common areas. For example, our partners may not need to develop a Power App for a certain task if another council has already done it for us.

4 Operational enablers

4.1   Microsoft licensing

4.1.1   Description

The authorities and Strata all share a single Microsoft agreement, and the current agreement comes to an end 31 March 2024. This section details the summarises the renewal for the next three years.

Decisions and budget for Microsoft licensing will need to be made prior to this Strata business plan being agreed, and a dedicated business case has been supplied to the architecture board for approval.

The recommendation will be that the partners upgrade their Microsoft licensing tier from E3 to E5, which will provide several features that will help achieve the Enablers referenced in this document.

4.1.2   Objectives

- ✔ Correctly license Strata and the authorities to meet the needs of the businesses, and where appropriate the requirements of the enablers defined in this document.

4.1.3   Assumptions

- That the numbers presented for user licensing are not going to dramatically increase.

- That the business case recommendation to move from Microsoft 365 E3 licensing go E5 licensing is approved

4.1.4 Deliverables

This section is about delivering the licensing rather than delivering the functionality behind the licensing.

4.1.5 Timeframe

The licensing will be live from 1 April 2024.

4.1.6 Costs and resources

Strata are managing the resourcing for the licensing renewal and will present options to the authorities.

The pricing has been obtained from an official government procurement, which was won by the software supplier Phoenix. This was an aggregated procurement with other government bodies across the country and run by Crown Commercial Services (CCS). The incumbent supplier, Softcat, also was included in this aggregated procurement.

What we currently pay for Microsoft licensing (per year)

- Users: £399,941
- Servers: £91,678
- Total: £491,619

(Based on 1,900 users)

Moving to E5 licensing

Strata has made a recommendation to move to the Microsoft 365 E5 license. The E5 license is the top tier of Microsoft user licensing, and includes all the features from E3 – our current license – and in addition:

- telephony (via Teams Voice. Excludes contact centre)
- security suite
- compliance suite

There is a discount to the E5 licenses over the three years if we commit to this at the start of the agreement. The discount decreases each year, however if we elect

to move to E5 part way through the agreement, we will have no discount applied. The cost in year three is the current full price of the E5 license.

Although E5 is the top tier of licensing from Microsoft, it does not include several other features such as Azure, Copilot, or the advanced features of InTune or Microsoft Teams.

100% E5	Year one	Year two	Year three	Total
365 Baseline	£493,686	£547,680	£610,428	£1,651,794
Additional software	£89,187.64	£92,640.30	£92,640.30	£274,468.24
On-prem servers	£106,003	£106,003	£106,003	£318,009.01
Total	**£688,876.64**	**£746,323.30**	**£809,071.30**	**£2,244,271.25**
Increase over current	£197,257.64	£254,704.30	£317,452.30	£769,414.25

Options for authority

An alternative is available to the authorities if they do not wish to have all the features available in E5, however Strata believes each are justified. If each feature is required, then it would be cheaper to go with the E5 option.

What is included in each of these suites, and how it benefits the authorities, has been explained in a separate document reviewed by the architecture board.

Additional software

This row in the costs represents:

- applications such as Project, Visio, and Visual Studios
- much cheaper 'F3' user licenses, specifically designed for 'frontline' and mobile only officers
- telephony handsets and room devices
- Power Apps and Power Automate
- Power BI Premium
- Teams Premium (a single license to reserve pricing)
- InTune Plan 2 (a single license to reserve pricing)
- InTune Suite (a single license to reserve pricing)

On-premises servers

The servers that reside within the Strata datacentres need to have appropriate licensing from Microsoft. These figures could be reduced upon each anniversary in the three-year agreement. Assuming enough services have moved to the cloud, we can switch-off servers and therefore remove licensing, in-line with our cloud strategy.

Not included in licensing

- Azure Purview (see enabler nine)
- Power Apps/Automate running costs (see enabler eight)
- Microsoft Azure running costs (see move to the cloud)
- Copilot (see additional projects)

4.2   Financing model

4.2.1   Description

In 2023/24 Strata redeveloped the budget monitoring process to give a far greater granularity and control over spend. This enables the budget we have set out to be with a high degree of certainty. It is proposed once we have competed a full cycle of cost for year 2023/24 we will be in a position to start to, monitor and build a strong picture of each council's spend. Note currently it is not planned to modify percentage contribution from partners.

4.2.2   Microsoft and key platform volume variation licencing

It is proposed to itemise all key licencing spend for each council to enable variations to be costed for against the service catalogue described in the ITIL process review section, as the council grows or decreases volumes.

4.2.3   Move to shadow budget for transformation

As we gain a greater understanding of the operational costs, we will track time spent on transformation work to enable greater capitalisation of project work and a more detailed cost analysis of operational running cost of ICT.

4.3   Reduce carbon footprint

4.3.1   Description

Strata is committed to reducing the carbon footprint associated with our operations. Significant progress has been made in recent years, primarily through reductions associated with the two datacentres, and reductions in travel largely because of reduced commute mileage following the Covid-19 pandemic. Recent hardware refreshes in the datacentres have reduced electrical consumption because the newer equipment uses far less power, and a reduced cooling requirement meaning less power is also needed for the air handling units.

The current methodology for recording carbon impact is currently flawed in that is based on pounds spent and doesn't take into consideration actual direct GHG emissions or the environmental credentials of individual suppliers. Each authority and Strata have historically been following the same methodology, as part of this business plan Strata intends to review this alongside the authorities to determine an accurate method to demonstrate actual progress against carbon reduction.

Strata's carbon reduction policy forms part of the commitment set out by its partners, which have committed to net zero as per their published targets.

4.3.2   Objectives

✔ Introduce a Sustainable procurement policy.

✔ Ensure when purchasing new hardware that consideration is given to environmental factors such as power consumption, service life, and recycle or reusability when the equipment becomes redundant.

✔ Green Travel Plan. A green travel plan can be used to identify and promote ways to encourage a range of sustainable, or less environmentally damaging transport modes, usually with the emphasis being on reducing single user private car travel. A plan addresses all transport issues within an organisation including staff travel into their place of work, staff travel on business, and clients visiting the organisation's premises.

✔ Strata have committed to evaluate staff membership of an electrical leasing salary sacrifice scheme, with a view to implementing if viable.

✔ Actively monitor the resource utilisation in the datacentres. As systems and servers move towards the cloud, and Global Desktop numbers reduce, the energy usage within the Strata datacentres will reduce. This will enable Strata to leverage the multi-billion-dollar investment companies such as Microsoft and Amazon have made in carbon reduction.

✔ Strata is aware of several schemes available to them to reuse, harvest components, or recycle redundant equipment.

✔ Explore options for offsetting carbon emissions. This could be achieved using a charitable partner to plant trees locally, and potentially be funded through disposal of redundant hardware or donations.

4.4 Prepare for move to cloud and server reduction

4.4.1 Description

Most the council's IT systems are currently running from two datacentres in Exeter. The primary datacentre at the Civic Centre in Paris Street, and a secondary datacentre at Oakwood House on Marsh Barton. There are 287 virtual servers running in the primary datacentre and 200 in the other.

As new systems are introduced, they are often on a Software as a Service (SaaS) model and hosted in the cloud, rather than on servers hosted locally. This is generally a more resilient approach as it is not dependant on local hardware and any maintenance or updates are managed by the system supplier.

The hardware in the primary datacentre, specifically the physical host servers and the data storage system (SAN) have been replaced in the past 18 months, and typically have at least a five-year lifespan and whilst there is no urgency to migrate to the cloud from a financial perspective, Strata will need to align to Exeter's asset consolidation strategy.

It would be very expensive to migrate the current server estate and would leave costly assets in the datacentre that have not depreciated, unless considered as part of the wider asset strategy. Therefore, Strata intend to create a business plan for migration to the cloud over the course of the next 12 months for implementation as appropriate in line with Exeter's asset strategy.

The plan will focus on rationalising the virtual servers that we have currently. This will be partly through consolidation, but also gradually decommissioning servers as services migrate to the cloud naturally.

4.4.2   Objectives

✔ Carry out an audit of the existing virtual server estate to validate the existing records. This can then be used to inform future decisions and may identify some 'quick wins', in particular any systems that are not currently in use.

✔ To adopt a 'cloud first' approach when considering new systems. This does not necessary mean always implementing cloud solutions, but rather than cloud solutions should always be considered in the first instance where these exist.

✔ To look to consolidate servers where possible. This may mean co-locating similar services, rather than each having its own server. There may also be cases where the same solution is in use at each council, but with each running from a separate server. Providing appropriate technical controls can be in place to separate the data this could present opportunities to reduce server numbers.

✔ To prioritise the completion of migration to Microsoft 365. Once all mailboxes have been migrated to Exchange Online, all file shares to OneDrive or SharePoint, and Skype for Business has been replaced there will be a significant number of emails, file and telephony servers that can be decommissioned. Once the user migrations are complete, there will still be potentially many shared mailboxes and legacy file shares that will also need to be migrated before the servers can be decommissioned.

✔ By moving to the cloud, it will enable Strata to utilise toolkits available to provide further efficiency in delivering the ICT estate to its partners.

4.4.3   Deliverables

✔ Strata will provide a roadmap to its partners during 2024/25.

4.5   Cyber security

4.5.1   Description

Cybersecurity is the practice of protecting systems, networks, and data from cyberattacks which use electronic methods to undertake the activity. Cyberattacks are malicious attempts to gain unauthorised access to, damage, or destroy systems, networks, or data. They can also be attempts to disrupt or disable systems or networks.

With the ongoing adoption of cloud technologies and specifically the Microsoft 365 suite, several activities will be required in the next period:

4.5.2   Objectives

- ✔ Email filtering transition from Mimecast to Exchange Online Protection with the integration of MS Defender for Office and MS Defender for cloud.

- ✔ Identify suitable web filtering for mobile workstations not accessing the Internet through the Global Desktop.

- ✔ Rebuild and base test of IT recovery (DR) plans, based on the councils business continuity plans.

- ✔ Definition of cyber Incident management processes including metrics.

- ✔ Configuration and operational process implementation for the cyber related elements of Microsoft 365, with an assumption this will include E5 security enhancements.

- ✔ Co-ordinate and undertake software patching, both those that are regularly delivered (Microsoft updates), those that are identified through the Security Teams vulnerability scanning and those published/notified from threat feeds and supplier notifications.

✔ Configuration of M365 Sentinel Security Information and Event Management (SIEM) solution to proactively detect and respond to cyber threat and incidents in M365 alongside maintaining and developing the on premises LogPoint SIEM, which will also need renewing in December 2024.

✔ Review the augmentation of the M365 security solution. This is currently being undertaken via the Trend Cloud Security solution; however, it is difficult to tell how effective it is with Mimecast providing much of the current first line security filtering.

✔ Ensure Strata is aligned via Disaster recovery plans and the council owned business continuity plans.

✔ Provide the Strata community of practice for security, providing:

  o direct architectural and policy advice and support for all project activities

  o authorisation for all change that has security implications

  o advice and guidance for the councils in security related matters and assisting in the response to external guidance, notices, security incidents and request for responses

  o overall security governance for Strata and direct involvement with the council's governance and assurance, supporting schemes like the LGA's Cyber360 initiative

  o Support of cyber related policies.

✔ Support of cyber related auditing and compliance activities including:

  o DAP audits

  o PSN code of compliance

  o cyber assessment framework

4.5.3   Assumptions

- The scope of the team will be focussed on the following:

  o Cyber threat protection, detection and response

  o IT security governance and compliance

- o Mimecast will not be renewed (at least in its current form) June 2024, requiring a transition of the email routing, spam management, security rules and operational tasks. The intention is to allow the email recipients greater ability to manage more general email scams and SPAM, allowing the Security team to focus more time on the greater Business Email Compromise (BEC) threat, predominantly Phishing and the detection and remediation of likely compromises.

  This will require the councils to agree to a reduction in security email management for spam and scams (gift cards, invoice fraud, sextortion).

  There will also need to be a risk decision on the filtering of file sharing links, which are increasingly being used as a replacement for email attachments. However, file sharing links have a higher complexity in checking, which generally adds delays in emails and is time consuming for the security team.

  These file sharing links are now a prime route to get malicious content into the organisation. However, classification accuracy is currently low.

- The security team will be responsible for software security patching and the identification of specific patching needs from vulnerability scanning and supplier information.

- The security team will review augmentations to the M365 security email filtering solution (Exchange online protection), currently undertaken by Trend Cloud Security.

4.5.4   Dependencies

➔ With the removal of Mimecast, as a minimum the Security Plan 2, included in Microsoft 365 E5 will be procured.

➔ Renewal costs of LogPoint are affordable.

➔ Suitable third-party support to assist in the configuration and migration from Mimecast to M365 Exchange Online. This process is complex and has both heightened operational and security risks.

4.5.5   Deliverables

✔ Migration off Mimecast:

- o All email directed routed directed to and from Exchange Online

- o Similar and enhanced:

    - security rules
    - spam handling
    - secure email
    - organisation branding
    - external authenticity configuration SPF/DMARC/TLS

- o User awareness of changes

✔ Web Filtering solution for laptops:

- o Agreement on requirements. Defender for Endpoint may provide enough filtering.

- o Procured/configured product to meet the requirements.

✔ IT Recovery Plans:

- o Updated IT recovery plans with full business impact assessment information from the councils, current and planned IT infrastructure and line of business applications.

- o Tested IT recovery plans, culminating in an agreed failover test from Civic to Oakwood. This failover test is likely to be a limited scope due to the risk of this type of test.

✔ Cyber Incident management plan:

- o To be developed alongside the Service Desk Incident management process to cover preparation activities, detection and identification, Containment, Eradication, Recovery and communication.

- o Tested plans as part of both internal Strata and cross council incident response tests.

✔ Configured and audited M365 (Defender/Entra) system:

   o Microsoft Secure score greater than 75%. This is currently 55% however this will improve when Exchange Online is fully configured and on the assumption that Security Plan 2 (M365 E5) is procured.

   o External audit of configuration with no critical or high recommendations.

   o The Strata security team can maintain the operational the operational security activities.

✔ Software patching and detection:

   o All critical and high patches to be implemented within a month. This will however always have caveats both to delay and expedite.

   o Agreed dashboard and metrics to demonstrate performance

✔ Security Information Event Management (SIEM):

   o M365 Sentinel enabled with base policies in place, tailored for Strata.

   o Renewed LogPoint solution.

✔ M365 security augmentation:

   o Review whether to continue with Trend Cloud Security which is up for renewal in February 2024.

   o Understand councils' risk appetite to using Microsoft Security without a second alternative vendor product.

✔ Compliance and certification activities:

   o Delivery of the 2024 PSN code of compliance.

   o Undertake a full gap analysis of the NCSC Cyber Assessment Framework (CAF) following the full formal launch of the CAF which is c.Q1 2024.

4.6   Rationalisation and transition of copper telephone lines

4.6.1   Description

In August 2021 BT Openreach announced their 'copper switch-off'. As part of the UK government's goal of providing gigabit connectivity across the UK, the public switched telephone network (PTSN) and its copper system will be switched off by the end of 2025.

The councils use many traditional copper telephone lines for several different purposes, including:

- Telephone lines to smaller sites
- Intruder and fire alarms
- Lifts
- Telecare alarm services (Home safeguard and HomeCall)
- Broadband connectivity to many remote sites (ADSL / FTTC)

All these services, if they are still required, will need to be migrated to a digital alternative before the copper circuits are ceased to avoid any loss of connectivity.

Work has already been carried out to identify a complete asset list of all the telephone lines and broadband services current in use. Across the three councils there are just over 120 broadband connections to different sites that will be affected, as well as nearly 300 traditional copper telephone lines. For the sites currently using copper broadband services switching to a digital alternative should provide significantly faster and potentially more reliable connectivity as a direct result of this work.

4.6.2   Objectives

✔ To look for opportunities to rationalise the number of copper services in use and cease any that are not required, in line with the council's asset rationalisation programmes. Whilst compiling the asset list several lines were identified that were no longer in use and were able to be ceased. As part of this piece of work Strata will work with the councils to identify any other services that are not required, which can be ceased, reducing the number of connections that need to be migrated and generating savings which will offset increases in connection costs.

✔ This will give Strata the opportunity to review network topology and design, and act appropriately to reduce cost and complexity.

✔ To work with the property teams at each council to migrate intruder and fire alarms, lifts and any other systems that currently require a fixed copper telephone line to a digital alternative. In most costs, this is likely to involve installation of Digicom or Dualcom devices which use mobile 4G connectivity to replace the telephone line.

✔ To replace the small number of analogue telephone systems (PABXs) with digital alternatives, if these are still required. There are currently analogue telephone systems still in use at Belle Isle in Exeter, Manor Pavilion Theatre in Sidmouth, and East Devon Business Centre in Honiton.

✔ To replace each copper broadband service with a digital alternative. Where available, these should be full fibre (FTTP) connections but there are still many sites where this technology is not available and may well not be available by December 2025. In these cases, Openreach recommend a technology called 'single order generic ethernet access' or SoGEA. SoGEA provides fast broadband connectivity over the existing copper cable, but without any telephone service.

4.6.3   Assumptions

• It is assumed that the cut-off date of December 2025 will not change, but there is the possibility that Openreach will have to delay this if their infrastructure isn't ready.

• There is also the possibility that some exchanges will be switched off earlier than December 2025, and we will need to be able to respond and reprioritise if this happens. Openreach have not said this will be the case with any exchanges in this area, but there are others in the country that have already been switched off, and we had to act quickly last year when

Virgin Media brought forward the end dates for some of their circuits within Exeter.

- That digital services will be available at all the locations prior to the switch off date.

4.6.4   Dependencies

➔ Support from the councils' property teams and their suppliers of alarm systems and lifts etc to ensure smooth transition with no loss of service.

➔ Support from the authorities to inform at the earliest opportunity of intentions of rationalization of property.

4.6.5   Deliverables

✔ Improved broadband connectivity at sites which are currently poorly served.

✔ Potential for cost savings depending on the degree of rationalisation.

4.7   Data operations and compliance

4.7.1   Description

With the considerable quantity of business-critical data that is supported by Strata and the need to ensure that the management of this data through the systems and processes that maintain is adequately controlled. To ensure this there are a range of more operational elements, primarily those not directly seen by the client councils but are needed to manage the operation.

4.7.2   Objectives

✔ Ensure data backups are undertaken and verified to agreed schedules. This includes the procurement of backup solutions to support both the on-premise servers in the data centres and increasingly providing recovery options for the Microsoft 365 data and the operations data, for example the configuration of the tenant.

✔ Support the Data protection responsibilities of Strata itself and provide data protection advice for the technical aspects to the councils, including the IT elements of data protection impact assessments.

✔ Support of the data governance and compliance for the Council and Strata SharePoint and other data repositories including the configuration of data loss prevention (DLP) once data labelling and DLP rules are put in place. There is an expectation that the detection and response to DLP incidents will be undertaken by specialist technical Strata staff.

✔ FOI co-ordination, usually of IT related requests coming into the councils but also the few direct FOI requests into Strata. Working with the councils there should be a drive to standardise, openly publish data to reduce requests and also to automate the gathering of FOI information. The FOI processes as currently the approaches are quite different.

✔ Extend the successful Strata IT change management process (CAB) to include key council representatives who will become the change owners.

✔ Determine the councils requirements for Policy Management and whether the current solution (Metacompliance) is fit for purpose. This has limited use in Strata and Exeter are increasingly adopting this. This now embeds fully within Teams.

✔ Develop non-cyber technical policies for the adoption by Strata and the councils

4.7.3   Assumptions

- That resource to support the above processes will be met from within Strata however there is currently a potentially larger activity to support the Data governance activities for the councils and Strata, both in the implementation and the ongoing support.

4.7.4   Dependencies

→ The outcomes of the data governance approach from the councils and the determination of the effort and skills required to deliver this.

4.7.5   Deliverables

✔ Data backups:

   o   Renewal of on-premise backup solution.

   o   Continual review of cloud backup solutions as this area is still quite immature from vendors.

✔ Data compliance:

   o   Support the data governance activities and identify and resource the resource to support these activities.

   o   Completion of non-cyber related polices and the adoption of these.

✔ Information requests:

   o   In conjunction with the councils deliver a more effective and efficient FOI process

✔ Change management:

- o Extend the process to include Council representatives in the CAB process.

4.8   Performance Management

The overall performance of Strata will continue to be monitored at the Strata board and JEC with reports on performance against SLA's and KPI's submitted. Monitoring of the transformation programme will be undertaken at the Joint Transformation Board as set out in the Company Mandate and governance structure.

4.9   Risk Management

Risk will be assessed on a project by project basis via RAID reports to the Transformation Board and architecture board at project inception. This will include evaluating assumptions and verifying prior to committing to spend.

5 Additional projects not included in timeline or costs

These projects have not been included in the overall costs or resourcing plans. It is anticipated that they will require to be fully reviewed to define if viable within cost envelope and resource constraints.

The projects have been requested by the authorities (shown by the reference number) or from within Strata.

Project title	Description	Benefits	Estimated effort	Estimated cost
CRM replacement	Research, procure and replace incumbent CRM system. Replicate all current forms, process and integrations. After which implement new processes.	Slightly more modern technology, potential better low code capabilities leading to reduced time to production	3 × 18 months	£1.5million
Digital signatures (ref: 78379)	The use of DocuSign (or similar) across authorities the standard e-signature solution Limited details of how or where this would be introduced Effort for work depends on the scope of work – if it is just the introduction of digital signatures it is less work for us, however if it is a top to bottom process redesign then it is a huge piece of work	Reduces printing costs, and delays when waiting for a paper signature	TBC pending decision	TBC pending decision

Project title	Description	Benefits	Estimated effort	Estimated cost
Joiners, Movers and Leavers processes (JML)	A full review of council JML process as they are currently very dated and frustrating. HR and IT processes are not joined up	Improve onboarding processes for new starters, reduces effort from managers, a good opportunity to automate many repetitive tasks Also helps have more accurate employee records by joining up HR and IT systems and helps to ensure the only staff who are active are real, improving licensing accuracy Movers within the authority create additional security issues where old permissions are not removed	Size: very large Cost – Internal resource (Strata + authority) and automation tools for account creation	TBC pending decision
Homelessness system in TDC (ref: 57858)	Replace the homelessness system with a more modern one, also used by ECC Project underway but expected to run into new financial year. Estimated to complete July 2024	Current system is outdated.	In progress already Size: very large	
Replacement carpark system TDC and EDDC (ref: 66704)	Replace Taranto with another solution	Current system is very unpopular, and supplier is struggling to meet the requirements of either TDC or EDDC	Strata ~120 days for one council or 163 Days both Authority ~150 days (each)	£132,000 per council Assumes all Strata days are paid at consultancy day rates, so external costs are factored in if required

Project title	Description	Benefits	Estimated effort	Estimated cost
EDDC Tunstall (home call) replacement (ref: 73008)	Replace the unpopular Tunstall system within EDDC, which has only been live for a couple of years. The supplier has been failing, so the service wishes to move elsewhere.

This has been discussed with EDDC already, and October 2023 EDDC Cabinet approved to changes that the service has been requesting

There is an additional component to the request from EDDC looking at the businesses processes of the department, which is also huge in scale, but would require business analysis from within the authority to understand what needs resolving, and how

ECC have now expressed an interest in updating from their very old on-premise 'PNC6' Tunstall solution into the same cloud-based system EDDC have. | A more reliable service to the council customers

There's also an argument about how much Strata should be involved at all with this piece of work as we're often just acting as the contract holder and not adding any value. | Easily £100K+ with software and resource requirements

Very large in size, even though this would move from one hosted platform to another due to data extracts

The request for a review and update of business processes is also very large in size.

ECC Project is minor in comparison as they have a much smaller implementation of Tunstall than EDDC did. | TBC pending decision |
| EDDC Licensing Lalpac to Idox migration (ref: 57850) | EDDC have not yet moved their licensing service away from Lalpac and onto our new standard of Idox. The service is against moving. | For Strata, it removes another system and makes it easier to deliver change to all three partners

Three-year ROI | Effort 140 days Strata

And 168 days for EDDC | ~ £130,000

Assumes all Strata days are paid at consultancy day rates, so external costs are factored in if required. |

Project title	Description	Benefits	Estimated effort	Estimated cost
EDDC Public Realm improvements (ref: 57845)	A very broad request to replace all the Public Realm systems and processes, including grounds maintenance, play parks, street cleansing, inspections, allotments, beach huts, pitches and open spaces, trees, coastal assets, and land assets	Current systems and processes are very outdated, so service has put this forward as part of their improvement plan	Very large dependent on full review of requirements	Could be £100K + in software alone and same again for resource. Potentially can use M365 for elements, however no business analysis has been done
Tree system convergence (TDC – ref: 77651) (ECC – ref: 68054)	EDDC have the cloud hosted EzyTreev, and as far as we are aware are satisfied with it TDC have on-prem EzyTreev and have logged a request to move to the cloud-hosted version ECC have Confirm and have requested to move to another product as the current one isn't fit for purpose, and would be willing to look at cloud EzyTreev	Single platform for Tree management	TBC pending decision	TBC pending decision
Oakwood host replacement - Strata	Oakwood DR hosts are no longer supported on the latest releases of VMware, meaning we cannot upgrade further (server side rather than VDI side) It may be possible to reduce the cost by moving existing server hardware from the Primary datacentre as systems migrate to the cloud, resulting reduced computing requirements there	Discussions needed on whether there is any appetite for this as more services are moving to the cloud	TBC pending decision	TBC pending decision

Project title	Description	Benefits	Estimated effort	Estimated cost
Revenues and Benefits system replacement TDC (ref: 79651)	TDC Revs and Bens contract with Civica expires June 2026 – procurement and implementation needs to be completed by then Opportunity for EDDC and ECC to align systems and processes. Likely system would be provided by Capita (as per EDDC and ECC) so there is an opportunity to align contracts as well. Noted that Capita don't have a released cloud product yet. Alternatively, TDC have been pursuing a joint-solution made without the big suppliers involved (but lead by Sedgemoor) nicknamed 'Alpha Project', however Strata has not been involved up to this point	Aligning systems would be a great opportunity to align processes across the three Revenues and Benefits services The solution explored by multiple authorities to develop an in-house Revenues and Benefits solution has been outside of Strata's control	18-month project	£400,000 (based on SMT January 2023)

Appendices

1 Financial report plan 2024/25

Please note numbers are subject to minor
changes (awaiting information)

Current financial status of the company

One of the three key objectives set for Strata by the owners was to deliver cost savings as set out in the original business case and subsequently amended each year since 2017/18. As the following table shows, Strata has to date delivered savings in excess of those projected. However, as outlined in the business plan the focus now needs to move towards investment in Strata to help the councils meet their digital strategy ambitions, rather than on maximising savings.

The table below sets out the projected savings against the 2023/24 business plan.

	Actual revenue savings	Projected revenue savings	Actual variance to projected
2015/16	£232,000	£262,098	(£30,098)
2016/17	£100,000	£20,000	£80,000
2017/18	£565,000	£252,836	£312,164
2018/19	£620,000	£381,961	£238,039
2019/20	£1,074,000	£853,888	£220,112
2020/21	£1,051,000	£696,167	£354,833
2021/22	£1,260,000	£747,804	£512,196
2022/23	£1,079,832	£702,415	£377,417
2023/24	£799,828*	£754,254	£45,574
Total	£6,781,660	£4,671,423	£2,110,237

*Predicted savings for 2023/24

The company's accounts

Strata have employed PKF Francis Clark to deliver an independent external audit of the company's accounts. The external audit provides confidence to the councils that the financial performance reported, gives a true and fair view of the financial position of the company. Acting as a company under the terms and conditions of a local authority does however bring challenges.

The company's balance sheet is weak, because of the Local Government Pension Scheme, and there is no simple solution, whilst the pension scheme remains open to new entrants. The weakness is a risk insofar as it affects the credit rating of the company.

However, the guarantee provided by the three owners of the council enables the directors to assess the company as being able to continue trading. The balance sheet value as at 31 March 2023 is £366K (net assets) however this has been influenced by a significant reduction in the liabilities of the pension scheme in the financial year to 31 March 2023 due to high interest rates however the scheme liabilities will increase as and when interest rates reduce in the future. The balance sheet value in the prior financial year had an overall net liability of £9.1M as at 31 March 2022.

Internal audit

In addition, Strata uses Devon Audit Partnership (DAP) to provide an internal audit service. The latest assurance report for 2021/22 confirmed an audit opinion of 'Reasonable Assurance' and stated:

'   There is a generally sound system of governance, risk management and control in place. Some issues, non-compliance or scope for improvement were identified which may put at risk the achievement of objectives in the area audited.

Each of the specific areas reviewed were assessed to have a Reasonable Assurance level of Assurance. In 2024/25 four topics from the below table will be selected for audit.

Entity	Sub areas	Audit assignment 2024/25
Cyber security (risk register)	Cyber security defences; cyber culture; backup and emergency response plans NB: all work will be informed by the Cyber Assessment Framework. The Cyber Essentials scheme will form baseline where technical assessments made.	Areas will be reviewed on a risk basis and include (but are not limited to) the following areas: • Firewall and access gateways • Secure configuration • Access management (internal/external) • Malware • Patch management (process and patch implementation) • Backup (process/technology/resilience/testing) All risks, including those relating to governance, will be considered in the light of the current cyber risk environment

Entity	Sub areas	Audit assignment 2024/25
Service transition Controlling service introduction, change and de-commissioning.	Change management; service asset and configuration; release and deployment; knowledge management; transition planning and support	Revisit the area to assess on basis of a point in time picture. Business Change elements including communication are critical for any M365 project streams. Review progress in relation to the delivery of the new improved Configuration Management Database. This CMDB should assist in understanding system interdependencies. Identify how systems get moved from the project phase to operational phase (transition) and how the CMBD is updated Suggest change management process
Service operation (processes) – executing the plan	Event; incident; request fulfilment; problem; access	Review service incident, major incident and service request processes including end user communications
Service design Detailing how to deliver the service.	Service level management; supplier; service catalogue; availability; capacity; ITSCM; service continuity; information security	Risks: capacity management Partners drive/need for more Digital capabilities – how does Strata support this strategy when resources are already max'd out support business as usual services? Resource management needs to be built into this and the ability to be 'agile' in our approach to meet rapidly changing needs of the authorities How does Strata fairly allocate resource to the three partner authorities?

Entity	Sub areas	Audit assignment 2024/25
Service operation (function)	Service Desk; Operations Control Management; Facilities Management; Technical Management; Applications Management Lifecycle	Risk: the Alemba vFire solution is not optimised due to current resourcing pressures resulting in poor value for money and missed opportunities Review the improvements being made with the vFire platform and identify how it will improve end user experience
Programme and project	Programme management; Project management	Review the suggested improvements to the Project Framework and how they will improve the project delivery process and how it can flex to address client need
Governance and mandate	Framework of authority and accountability; delivery of strategic and operational outcomes	Risks and weaknesses identified as part of previous work Risk: the board does not exert sufficient leverage on the partners Suggest assess new governance arrangements for board, partners and IRB

Summary of revenue budget

The basis of the business plan budget is a build-up of the expected income and costs of the business with an income from the three councils to cover the net cost. In previous years there has been a target savings for distribution back to the councils built into the budget, however the approach has been changed this year with the contract payment income matched with the costs of the business net of any sundry income. The supplies and services cost forecast has been worked up in detail to aid more accurate budget monitoring in 2024/25. There is no contingency built into the cost base and therefore should any unexpected additional funding be required it will be requested on an exceptional basis.

It is assumed that any savings achieved at the end of the financial year will be reinvested into the business and will not be distributed to the Councils as they have in previous years.

The table below shows the cost and income calculations for the next three years.

		Budget 2024-25	2025-26	2026-27
Income	Contract payment	£8,299,323	£8,573,543	£8,852,569
	Document Centre recharges	£33,000	£34,650	£36,383
	Mobile telephony recharges	£144,000	£151,200	£158,760
	Interest income	£12,150	£12,758	£13,395
	Total	**£8,488,473**	**£8,772,150**	**£9,061,107**
Staff costs		**£(4,074,578)**	**£(4,137,561)**	**£(4,194,789)**
Transport		**£(7,455)**	**£(7,828)**	**£(8,219)**
Supplies and services	Core	£103,798	£108,988	£114,437
	Infrastructure	£1,328,630	£1,395,062	£1,464,815
	Document Centre	£371,769	£390,358	£409,876
	Compliance and security	£195,439	£205,211	£215,472
	Business systems	£2,055,661	£2,158,444	£2,266,366
	WAN	£179,024	£187,975	£197,374
	Telephony	£149,802	£157,292	£165,157
	Product delivery	£3,000	£3,150	£3,308
	Service desk	£19,316	£20,282	£21,296
	Total	**£(4,406,439)**	**£(4,626,761)**	**£(4,858,099)**
Net income		**£0**	**£0**	**£0**

In the financial year 2023/24 £376K of profit distributed to the councils at the end of 2022/23 was handed back to Strata to fund the programme of organisational change which will continue into the financial year 2024/25 as outlined in this business plan.

It is expected that a proportion of the reorganisation spend planned for 2023/24 will not be delivered until 2024/25 (outside of the budgeted costs as set out in this business plan) and therefore it is proposed that any unspent funds distributed to the council at the end of the 2023/24 financial year will be handed back to Strata to fund these costs in 2024/25.

Income

Strata's income comprises of contract payment from the councils and sundry income from interest income, mobile phone and Document Centre recharges.

The total contract payment to be paid to Strata by the Councils in 2024/25 is £8,299,323. The contract payment has been calculated to cover the projected costs of the business net of any sundry income/recharges and is shared between the councils according to the % share in 2023/24, plus new contract additions by council incurred since the 2023/24 Business Plan.

A comparison of the forecast contract payment by council in each financial year can be seen in the table below:

Contract Payment	Budget 2024/25	Share by council 2024/25	2025/26	2026/27
EDDC	£3,213,432	38.7%	£3,325,532	£3,433,762
ECC	£2,788,034	33.6%	£2,883,512	£2,977,356
TDC	£2,297,857	27.7%	£2,364,499	£2,441,452
Total	**£8,299,323**		**£8,573,543**	**£8,852,569**

The 2024/25 contract payment reflects inflationary increases in the existing contract estate and other operating expenditure, significant new additions to the

contract estate as detailed below and new contracts acquired by the councils since the last Business Plan to date.

The contract payments have historically been split evenly over the four quarters of the financial year however this does not reflect the actual cash flow requirement of the business and Strata will work with the respective Councils and s151 officers to align revenue payments with third party expenditure in 2024/25.

In addition, the following other income is forecast to be received:

Other income	Budget 2024/25 £	2025/26 £	2026/27 £
Document Centre Recharge	33,000	34,650	36,383
Mobile Tariff Access Recharge	144,000	151,200	158,760
Interest income	12,150	12,758	13,395

Mobile phone recharges are forecast to be c9.7% lower than in the 2023/24 Budget due to cost savings achieved by renegotiation of mobile contracts during 2023/24. Document Centre recharges are projected based on expected costs in 2024/25. Both recharges reflect inflation at 5% in each of the outer years 2025/26 and 2026/27

The forecast for interest on bank deposits is estimated to be significantly lower than the outturn forecast for 2023/24 despite the base rate remaining at its highest level for many years. This is due to Strata having benefited from an artificially high interest rate on its bank account that has come to an end around the time of this business plan submission. Therefore, a more conservative estimate for interest income of £12K has been factored into the 2024/25 budget, net of Corporation Tax at 19%.

Staff costs

Staff costs are projected to increase by c.£300K in 2024/25 (before inflation uplift) due to new positions created by the organisational change, compared with the costs under the current structure. This is to ensure Strata has the required skills to deliver the transformation planned and it is proposed that this additional cost will be reduced over the following two years thereafter.

The 2023/24 staff salaries are inflated by 4.0% (3.5% inflation + 0.5% for increment increases) for 2024/25 and on-costs (for example, NI employers and pension contributions) are applied at 29% as in previous years. Also, as in previous years the staff costs figures do not include the Business Systems team resource which is paid for and dedicated to an authority capital project. These resources are recharged to the relevant authority.

An inflation assumption of 4% and 3.8% has been applied to staff costs in the outer years 2025/26 and 2026/27 respectively, with further staff costs reductions delivered in these years due to efficiencies made by transformation in the business.

A shortfall in funding the 2023/24 pay award of c.£60K has not been factored into the 2024/25 budget and will be reflected in a lower savings distribution at the end of the 2023/24 financial year.

Transport

An inflation assumption of 6.5% has been applied to the forecast 2023/24 costs to calculate the budgeted 2024/25 cost, and 5% inflation has been applied in each of the outer years 2025/26 and 2026/27.

Supplies and services

Contract costs have been estimated for 2024/25 using an RPIX contract renewal inflation assumption of 6.5% that has been applied on renewal for existing contracts in 2024/25, except where a higher than inflation increase is expected, for example where an existing multi-year contract is to be renewed, or the price is currently fixed by an existing multi-year contract. Other non-contract based operating expenditure has 6.5% inflation applied to the expected annual cost.

In the case of Microsoft licencing a significant increase of c.£200K is anticipated on 2023/24 costs due to increased host servers and a licensing upgrade for Microsoft 365 under Option E5 as described in section 4. Some significant additions have also been budgeted to be added to the contract estate as set out in section 2 with the most significant being £266K for contact centre telephony and £100K for Copilot for Microsoft 365

An inflation assumption of 5% inflation has been applied to the forecast 2024/25 cost in each of the outer years 2025/26 and 2026/27.

See also:

> 1   Context from ICT director

> 4   Operational enablers

Summary of capital budget

The capital requirements of the business in 2024/25, as outlined in section six can be summarised on the next page:

The capital requirements are in addition to the annual £150K capital Tri-Payment for infrastructure requirements. At the end of 2023/24 there is forecast to be a £214k Tri-Payment reserve that will be carried forward into 2024/25. All Tri-Payment capital spend will be appropriated by the Architecture Board for infrastructure replacement and rectification needs.

As in previous years, any remaining 2023/24 approved capital budget not spent in the approved year is proposed to be carried forward into 2024/25.

Financial report plan 2024/25

	2024/25				**2025/26***	**2026/27***
	Total	**Funded by EDDC**	**Funded by ECC**	**Funded by TDC**		
Percentage split as per the original business plan		38.8%	33.6%	27.6%		
Project						
Contact centre telephony	£50,000	£18,346	£17,968	£13,686		
Core telephony	£50,000	£18,346	£17,968	£13,686		
EUC model staff	£40,000	£14,677	£14,374	£10,949		
EUC model equipment (replacement laptops)	£297,660	£30,750	£242,310	£24,600	£250,000	£250,000
Booking	£50,000	£18,346	£17,968	£13,686		
SharePoint resource	£60,000	£22,015	£21,562	£16,423		
Chatbot	£50,000	£18,346	£17,968	£13,686		
PSTN	£30,000	£11,008	£10,781	£8,212		
Print and post review	£20,000	£7,338	£7,187	£5,474		
Website	–	–	–	–	£30,000	
Total capital Funding	**£647,660**	**£159,172**	**£368,086**	**£120,402**	**£280,000**	**£250,000**

* Split by Council share as per the original Business Plan

2   Glossary of terms

4G, 5G: mobile connectivity.

ADSL: internet connectivity via copper connection to the property.

Agile: a project management methodology that came from Software Development and focuses on getting the best value as quickly as possible.

AI: artificial intelligence, a huge topic in the modern world, and is increasingly being used to automate and streamline processes.

API/API gateway: application programming interface, how we get one system to talk to another.

BYOD: bring your own device – allows the use of personal devices to connect to corporate data.

CAB: Change Advisory Board – in place within Strata to ensure technical changes are approved before being executed.

CCS: Crown Commercial Service.

Centre of Excellence: a term used for the Power Platform for governance. This is driven partly by technology and partly by policy.

Chatbot: intelligent chat-bots that do not require a human to provide responses in real-time to a customer. Usually based on pre-defined responses.

Cloud: compute power across multiple locations.

CMS: content management system, predominantly for web-based content.

Contact centre administrator: a technical role for the contact centre to help with the infrastructure setup, including interfaces to other solutions.

Contact centre agent: the people handling calls within the contact centre.

Contact centre supervisor: gives staff enhanced features, which varies from system to system. This could be giving them the ability to change messaging that callers hear when contacting the partners.

CRM: customer relationship management, technology for managing customer interactions with a goal of improving the business relationship with its customers.

Customer platform: a collection of systems to deliver services to residents. Comprises of the CRM, , online forms, web, communication tools and booking tools.

DAP: Devon Audit Partnership.

Data retention: written or technical policies that causes data to be destroyed after the agreed length of time.

Data warehouse: a repository of structured data from multiple sources to allow creation of dashboards for greater business insights.

Digicom/Dualcom: digital communication system used for alarm signalling (fire/intruder/lifts).

DMARC: domain-based message authentication, reporting, and conformance. A technical standard that helps protect email senders and recipients from advanced threats that can be the source of an email data breach.

Document lifecycle: where documents are stored and how long they are kept for, also see 'data retention'.

DR: disaster recovery.

ECC: Exeter City Council.

EDDC: East Devon District Council.

EMA: enterprise middleware architecture.

EUC: end user computing.

Evergreen: a term used to describe software that is constantly evolving and changing the way it looks and feels, usually cloud-based.

FOI: freedom of information.

Forms: online forms that customers can fill in from the partner websites, such as recording a missed bin.

FTTC: fibre to the cabinet, a form of Internet provision that provides greater connection speeds than traditional copper (phone lines).

GHG: greenhouse gas (emissions).

GIS: geographic information system, mapping solutions across the partners.

Global Desktop: a Strata branded desktop used by all partners and Strata themselves to connect to systems and data. Uses multiple technologies.

ITSM: IT service management, activities performed to design, build, deliver, operate and control information technology.

ITIL: information technology infrastructure library, a set of practices and a framework for IT delivery within an organisation.

IVR: interactive voice response. Regularly within contact centres to help direct callers to the correct location. 'press one for …', 'press two for …'

JML: joiners, movers and leavers process. This is the joined-up process between the business, HR and IT for staff joining, leaving, or moving within the organisation.

Kanban: a very visual form of agile working to help manage priorities and workload.

Laptop build: the configuration of the laptop or computer, including what applications and security is setup.

LGA: Local Government Association.

Load balancer: a way of protecting a system resource by spreading the load out across multiple servers.

MFA: multi-factor authentication, when logging into a service the user is asked to provide a secondary login, such as a code from an authenticator application, or from a text message.

MFTP: medium term financial plan.

ML: machine learning, part of AI (artificial intelligence).

MS: Microsoft.

NCSC (LG) CAF: National Cyber Security Centre Cyber Assessment Framework. Provides systematic and comprehensive approach to assessing the extent to which cyber risks to the essential functions are being managed by the organisation responsible. There is a LG (local government) version of this that better reflects the needs of this sector.

Notification engine: most transactions that occur require some sort of notification, whether to staff within the authority or out to customers. These notifications can be email, text message, letter, or even WhatsApp . A notification engine will simplify the creation and management of these notifications, enabling the authority staff to embed these into processes themselves, while at the same time making it easier for Strata to manage.

Omni-channel: a contact centre term to describe multiple channels, for example telephony, chat, social media and data insights all within the same system.

On-premise: where servers or systems are running from within the Strata datacentres. The alternative is from within the cloud, which is a distributed datacentre owned by somebody else.

PSN: public service network, a secure connection between different government bodies within the UK. Connection to the PSN requires sign-off following security audits by third parties.

PSTN: public switched telephone network – this is the aging copper telephony network across the UK that is due to be switched off in 2025.

SaaS: software as a service. Cloud-based applications that are typically subscription based, pay per person per month.

Secure score: a score given by Microsoft 365's security suite of applications.

SEO: search engine optimisation, improvements in SEO will help direct customers to the correct location on the partner websites

Service Desk first, second and third line: In support terms, first line is the first point of contact, and then the numbers represent escalation. Third line would handle more technical requests or potentially escalate to the next stage.

SLA: service level agreement.

SoGEA: SOGEA stands for 'single order generic ethernet access'. It is a digital broadband connection that can deliver speeds of up to 80Mbps over existing copper cables.

SPF: sender policy framework, email authentication method that helps identify the mail servers that are allowed to send email for a given domain, and is key to spam management and impersonation threats.

Sustainable procurement: this is defined as a process whereby organisations meet their needs for goods, services, works and utilities in a way that achieves value for money on a whole life basis in terms of generating benefits not only to the organisation, but also to society and the economy, whilst minimising damage to the environment.

TDA: Technical Design Authority.

TDC: Teignbridge District Council.

Technical debt: technical debt is a term used to describe the elements that slow down the delivery of new functionality and solutions. For example, a lack of training, or where multiple system upgrades are needed prior to delivering the features a business wants. The more technical debt you have, the slower you will be in delivering successful change.

TLS: transport layer security, designed to provide communication security over a computer network.

Unified communications: bringing together internal chat (Instant Messaging), telephony and presence (see if somebody is available before calling) all within your computer.

VPN: virtual private network, a secure connection into your corporate data.

Web chat: a human-to-human chat over a website, which is different to a chatbot, which is a human chatting to a set of pre-defined responses.

Website content: the site layout, pages, and words on each of the partner websites.

3 Glossary of technical products

Alemba ASM: the IT service management solution used by Strata. includes incident management, problem management, asset management and change management along with self-service.

Alpha Project: an open-source revenues and benefits solution, jointly being developed across multiple authorities.

Anywhere365: the existing contact centre used by the three partners and Strata, due to be retired or replaced as part of the telephony and contact centre.

Booking Lab: an example solution for manging bookings of assets.

ChatGPT: an AI-driven chat bot that can mimic human language. ChatGPT is the basis of Copilot for Microsoft 365.

Confirm: asset management tool in use in Exeter.

DECT: digital enhanced cordless telecommunications currently in use, mainly in Exeter. Due to be decommissioned as part of the telephony enabler.

DocuSign: a popular solution for digital signatures, referenced in the additional projects section.

ESET Endpoint Security: The partners and Strata's current anti-virus solution.

EzTreev: a solution currently in place at East Devon for managing trees, referenced in the 'additional projects' section.

Global Desktop: the virtual desktop used by all partner officers and Strata to access data, applications, and telephony. The term Global Desktop was created by Strata and is based on technology provided by VMWare. Referenced in enabler one, new end user computing model.

GovService/Firmstep also known as Firmstep. Used to manage customer data and to provide online forms on the partner websites.

IDOX: a solution that manages Planning, Environmental Health, and Licensing across the partners.

iTrent: the HR and Payroll system in use by the three partners. Referenced in 'additional projects'.

Lalpac: a licensing solution still in use by East Devon District Council. Referenced in 'additional project's.

LogPoint: a repository for multiple systems audit and event logging.

MetaCompliance: a solution in place for Exeter and Strata that allows management and deployment of policies.

Microsoft 365: a large suite of tools and features provided by Microsoft, that include many of the other applications referenced. Referenced in multiple parts of the document.

Microsoft Always-On: a Microsoft version of a VPN (see 'VPN').

Microsoft Azure: Microsoft's cloud-based datacentre for hosting software, servers or for leveraging the power of cloud computing.

Microsoft Bookings: a product within Microsoft 365 to enable the booking of assets. Referenced in enabler section 'bookings'.

Microsoft Compliance Suite: a suite of features that enable richer control of data. Referenced in enabler section 'data platform'.

Microsoft Copilot: an artificial Intelligence toolset designed to make individuals more efficient with repetitive tasks.

Microsoft Defender/Defender for EndPoint: Microsoft's enterprise security platform.

Microsoft Entra: a central database of accounts for IT, previously known as Active Directory or Azure Active Directory.

Microsoft Exchange Online: the partners email solution, which is in the cloud and part of Microsoft 365

Microsoft InTune: a suite of features to help manage the features and security of laptops, computers, mobile phones, and tablet devices.

Microsoft 365/M365: Microsoft 365 includes all of Office 365 plus additional features such as mobile device management, and security and compliance tools.

Microsoft M365 E3: our existing licensing tier for Microsoft 365. Enables partners to access standard features such as Windows, Microsoft Office, and Microsoft Teams.

Microsoft M365 E5: an enhanced version of E3, with additional features such as telephony.

Microsoft M365 F3: a reduced version of E3 specifically designed for mobile or front-line officers.

Microsoft Office 365: the cloud version of Microsoft Office that is used by the partners and Strata. Office includes common business tools such as Outlook (email), Word (documents) and Excel (spreadsheets).

Microsoft OneDrive: a location to store documents in the cloud.

Microsoft Outlook: our current email solution used across all partners.

Microsoft Power Apps: enables the ability for low-code application creation.

Microsoft Power Automate: provides additional capabilities to automate simple repetitive tasks.

Microsoft Power BI: provides dashboards for performance and trends across multiple subjects.

Microsoft Power Platform: encompasses Power Apps, Automate and BI.

Microsoft Purview: unified data governance solution.

Microsoft Security Suite: enables additional security features within the Microsoft licensing. Included as part of Microsoft 365 E5.

Microsoft Sentinel: cloud-based security information and event management platform, using built-AI to help analyse large volumes of data.

Microsoft SharePoint: a key data repository, currently in use by Teignbridge but one of the key enablers for all three partners and Strata.

Microsoft Skype for Business: our existing telephony product used by all partners, due to be retired as part of the telephony and contact centre work.

Microsoft Teams: a collaborative workspace for staff and external bodies.

Microsoft Teams Premium: an enhanced version of Microsoft Teams that comes with additional features.

Mimecast: provides email security.

Orlo: a product in use by partners to help manage the multiple social media channels.

SafeNet: a product in use by Strata for multi-factor authentication.

Taranto: the existing car park solution in use at East Devon and Teignbridge councils.

Trend Cloud Security: assists in identifying security threats.

Tunstall: the existing telecare solution in use at East Devon and Exeter councils.

Umbraco: the content management system (CMS) in use at each partner for their main websites.

vFire: now called Alemba ASM. Strata's IT service management solution.

WhatsApp: popular messaging product over the internet.