LGimprove

Information in Councils

Who are we?

"We help Microsoft-based organisations unlock the value of their information by structuring and cleansing their data, automating processes and training their people.

All through virtual, cost-effective programmes."

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Context

DATA OBSERVABILITY

From Lost Opportunities to Lost Revenue: The True Cost of Bad Data

August 17, 2023 • 10 Min Read

The Cost of Low-Quality Data for Decision Intelligence

Come clean: 'Dirty data' costs UK firms £900bn a year

Businesses which fail to keep their

UK public procurement: The cost of poor quality data

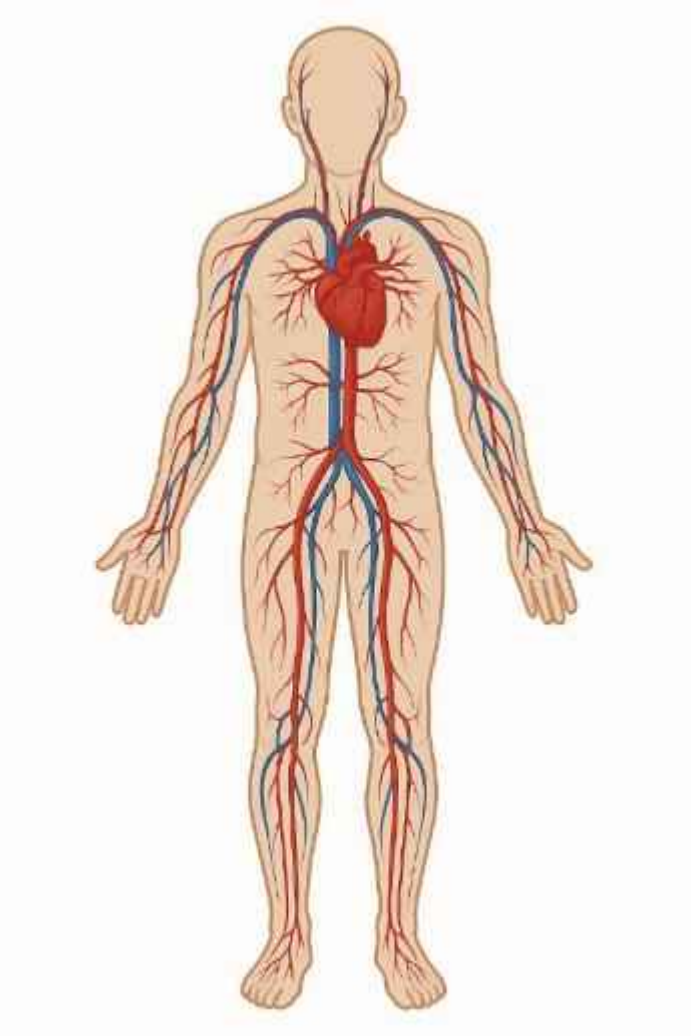
DATA

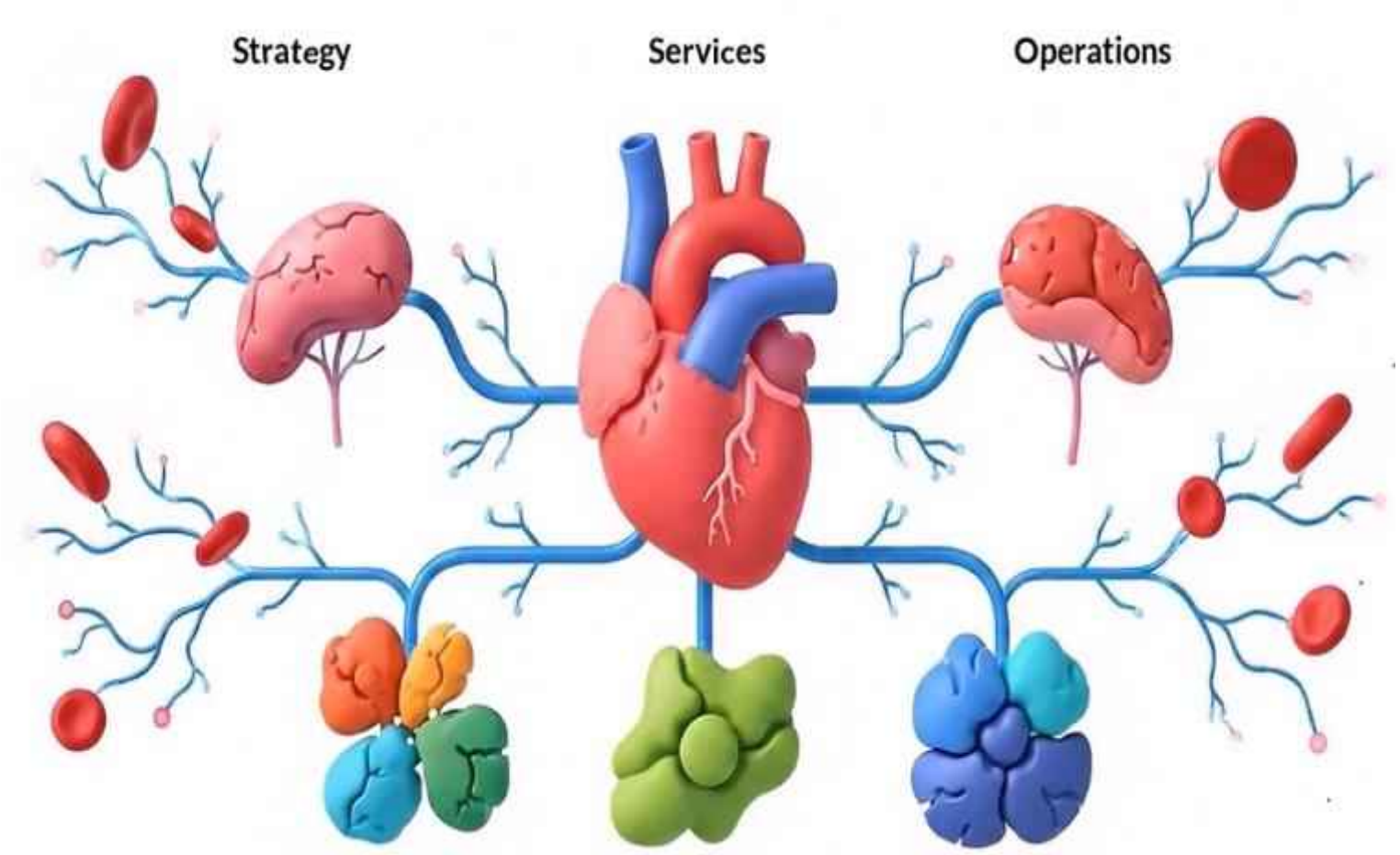
43% of public sector organisations do not have a data strategy

- Up to 83% of survey respondents say they are 'unsure' if data management protocols exist in their organisation
- 33% of respondents say they have no specific budget for data initiatives
- 44% do not have an open data or data transparency policy.



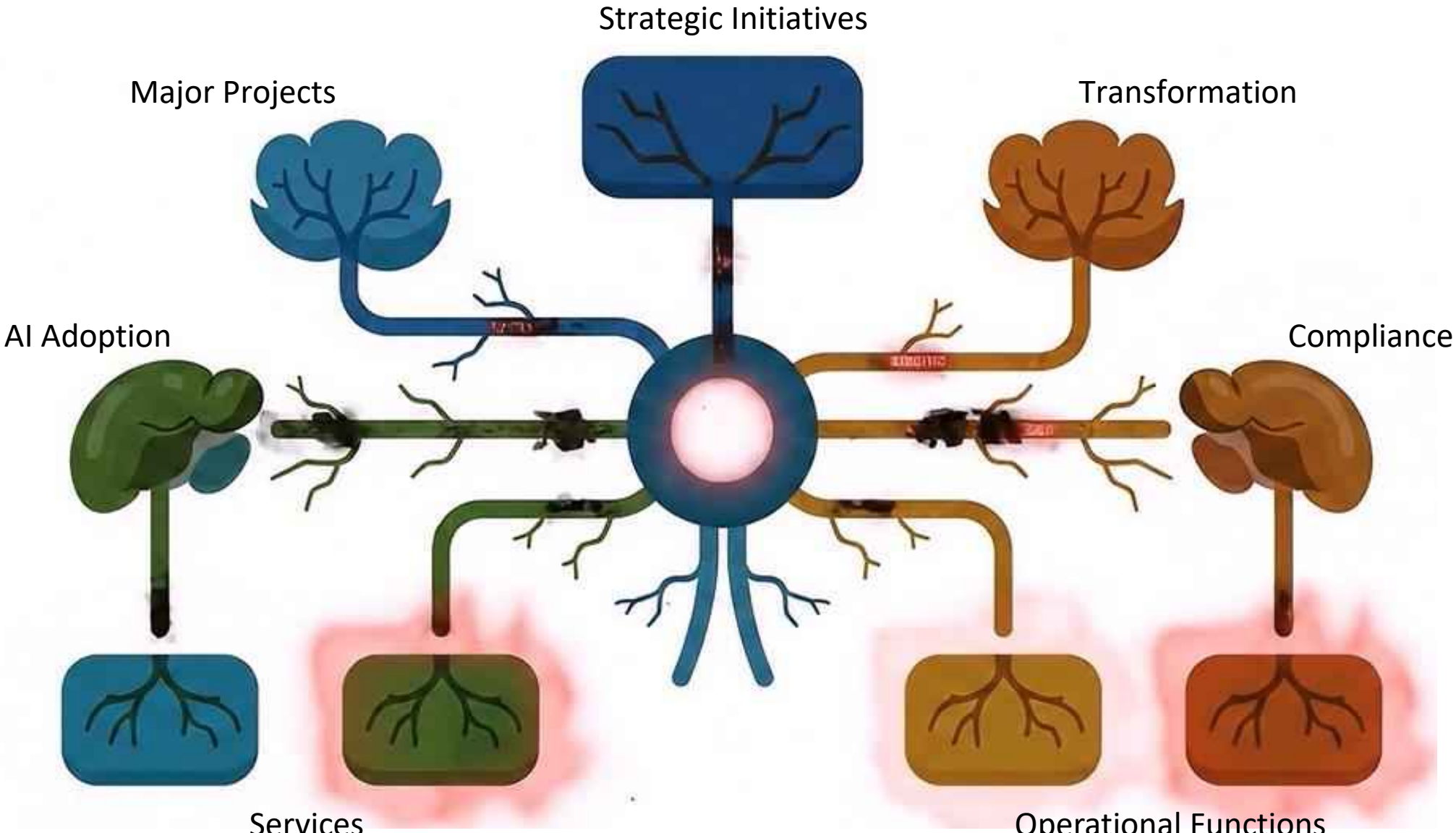
Information





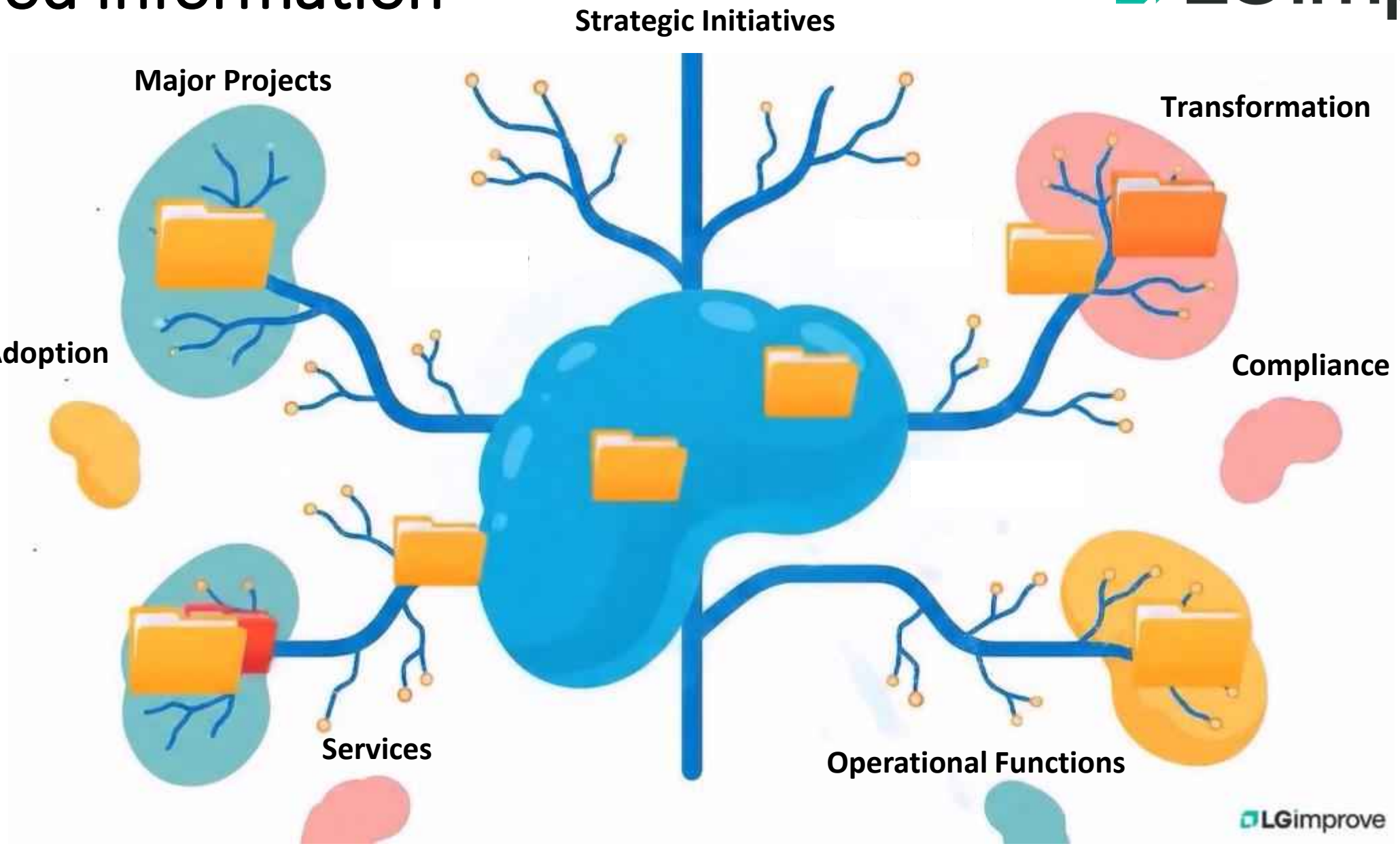
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Bad information



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Good Information



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How?



- Diagnosis (Discovery):
  - Investigation
  - A clear, achievable plan.
- Resolution (Delivery):
  - Data & technology.
  - Process & workflow.
  - People & culture.

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Common Challenges - Poll



- Lack of compliance
- Unstructured data in silos
- MS365 deployed without a strategy
- Dislike of SharePoint
- Records Management not a priority
- Lack of digital skills

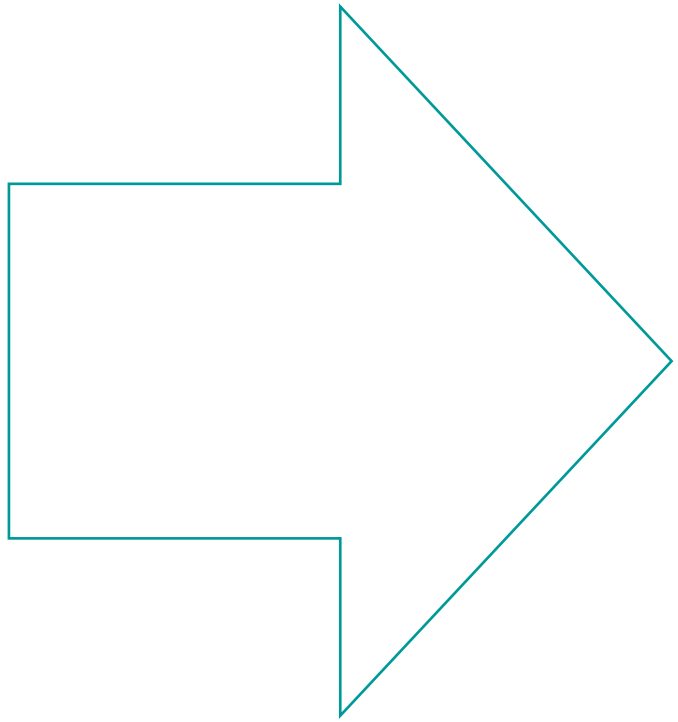
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Where do you start - Remove the ROT

- Duplication
- Redundant data
- Obsolete
- Trivial
- Hidden files
- Inaccessible files

70%

Unstructured data

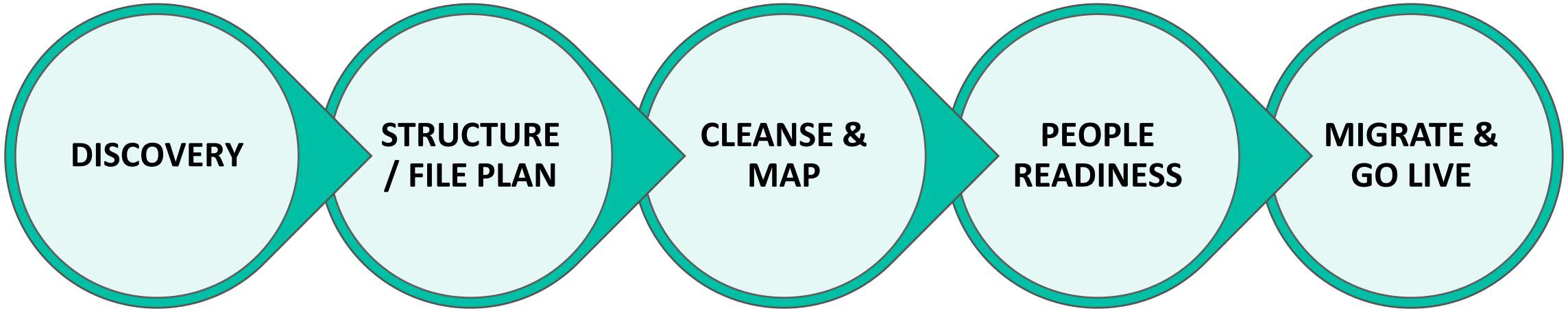


30%

Clean,useful data

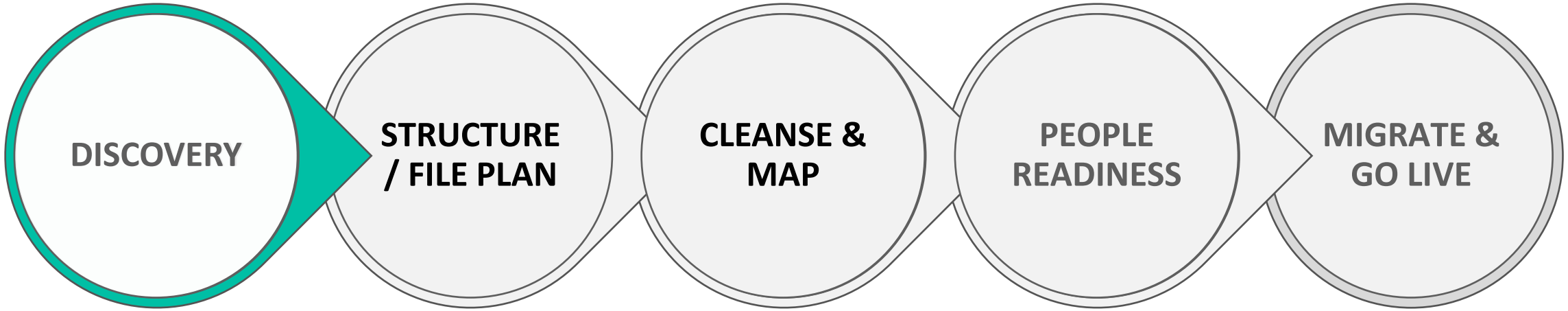
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The LGi IM Solution (IMS)



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LGI IMS – Discovery



- **Overview & Readiness**
- **Functional Mapping**
- **Solution Design**
- **Effort Estimation**
- **Planning**

Decision

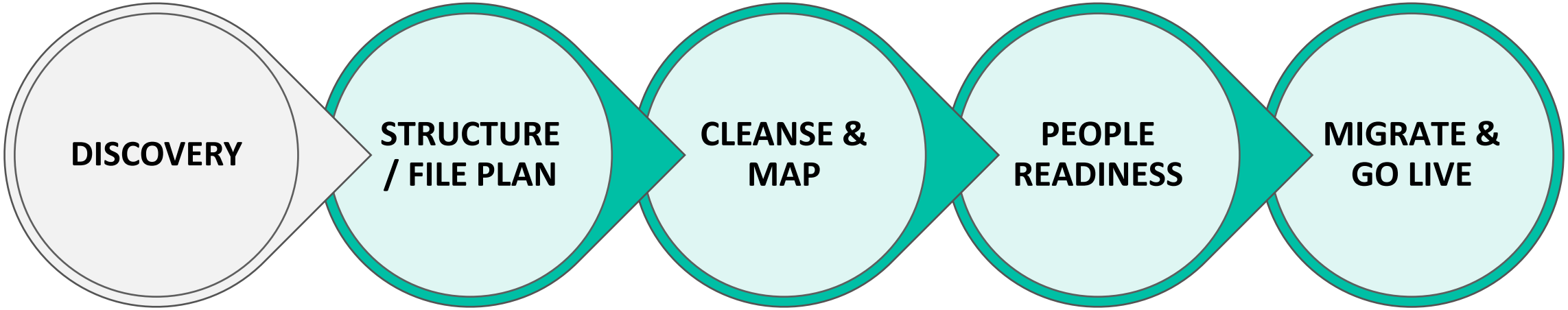
A full blueprint for your information solution – the effort, costs and timescales.

You can then implement this:

- Internally
- With LG Improve
- With another supplier

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LGi IMS – Delivery



- Every Team
- File Plans agreed, permissions and retention
- Built in your SharePoint

- Staging Area
- Map to new structure
- Plan migration

- Communications Toolkit
- Training
- Materials
- Support

- Migration
- Go Live
- Old way – Read only
- Repeat

Cultural Journey to Sustainable Change

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Staffordshire County Council

www.staffordshire.gov.uk

Staffordshire County Council
Corporate File Plan Journey

Hedda Motherwell

Information Governance Manager & Deputy DPO

01 Background

🗂️ Key Challenges

- Organic, unstructured file growth, inconsistent info management and file storage.
- Significant DROT, difficulty locating records.
- Compliance risks with legislative requirements.
- Staff reliance on legacy systems and ad hoc solutions.
- New technologies introduced.
- Resources, staff capacity and buy in.

⚠️ Need for Action

- Legacy systems being decomissioned.
- Non-compliance risks, potential audit failures.

02 Why external support?

🚧 Internal Barriers

- Capacity within IG to manage a large-scale culture change project alongside BAU.
- Complexity of problem, involving all departments, legacy systems to 365.

🤝 Decision for External Expertise

- Experienced perspective, specialist knowledge, experience from similar projects.
- Aided avoidance of common pitfalls.
- Proven track record and understanding of local government challenges.
- Provision of hands-on support.

💡 Advice to Others

- Assess your internal capacity honestly, don’t underestimate scale of change.
- External support most effective when it complements, not replaces, internal expertise.

03 Delivery in Practice

🏗️ **Implementation**: Pilot, complex project plan, roles and respon, intel gathering, mapping existing activities, mapping legacy data, testing, training/engaging stakeholders.

🔄 **Day-to-day realities**: Change resistance, digital skills, continual engagement and clear communication.

🧩 **Challenges**: Data quality/quantity, data types, shifting org. priorities.

🏃 **Agile project management**: Ability to adapt plans as new issues emerged.

🤝 **Collaboration**: Close working relationships between SCC Project Team and LGi were essential, and internal ICT.

🛡️ **Challenges Overcome**: Drawing on varying expertise, strong project team. Grit, resilience and determination!!

Function level



SharePoint | Search across sites

Corporate File Plan | Global Navigation | My OneDrive | StaffsSpace | Digital Preservation | Training and Support | Guides | Edit

Staffordshire County Council

Corporate File Plan

Recycle bin | Edit | Following | Site access

New | Page details | Analytics | Published 02/01/2024 | Share | Edit

Staffordshire County Council

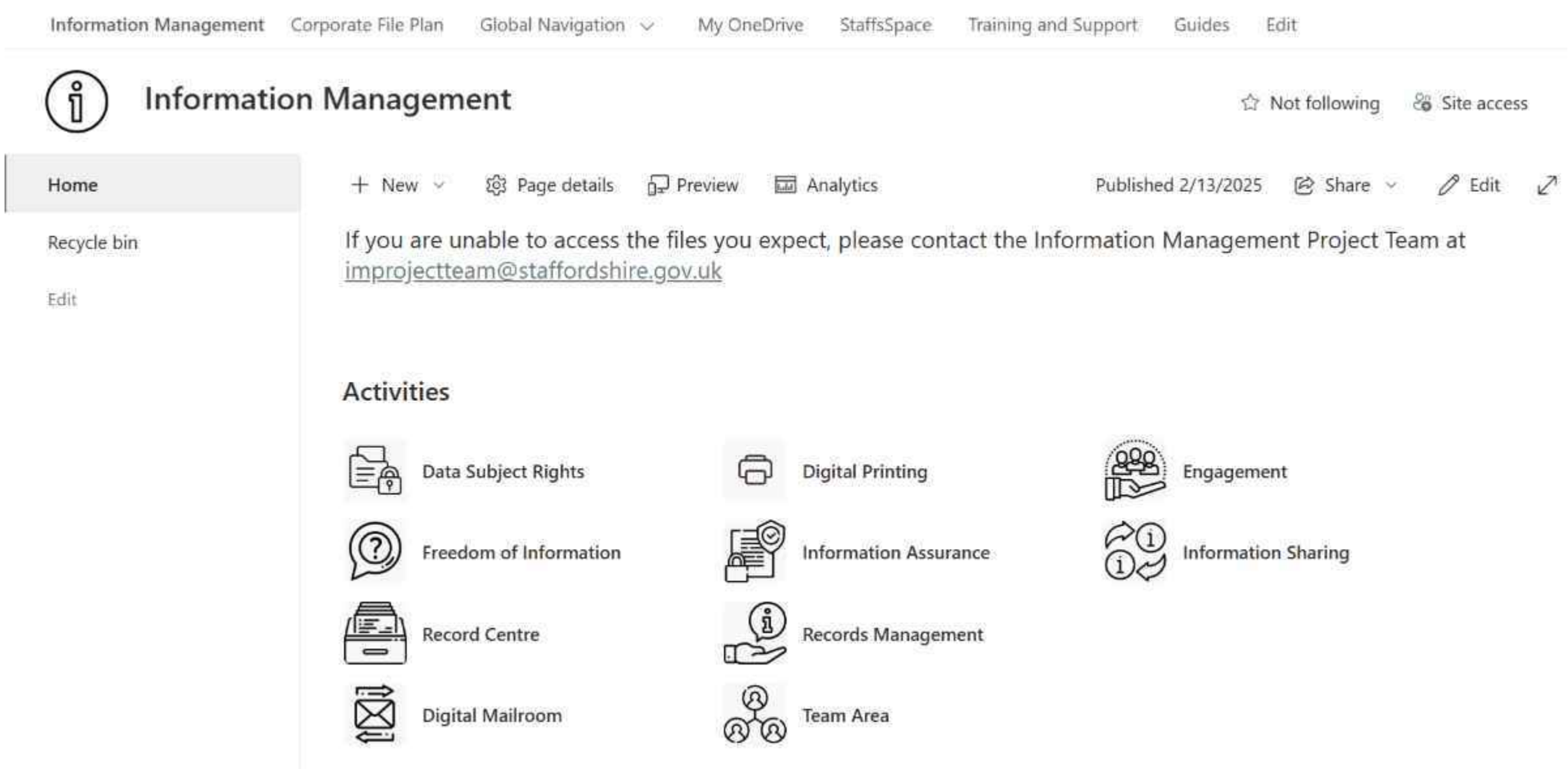
Welcome to the Corporate File Plan

The Corporate File Plan is our central location for business information (think of it as the council's digital filing system). All business areas have individual sections within the file plan. All colleagues can navigate the top levels, but you will only be able to access information which is relevant to your team and role.

Functions

- Corporate File Plan Training and Support
- Adult Care Services
- Children's and Families Services
- Commercial
- Communications
- Community Safety and Emergencies
- Customer Service
- Economic Community Regeneration
- Education and Skills
- Environmental Health and Licensing
- Environmental Protection
- Finance
- Health and Safety
- Human Resources
- Information Communication Technology
- Information Management
- Internal Audit, Risk Management and Insurance
- Leadership
- Legal Services
- Leisure and Culture
- Member and Democratic Services
- Planning and Building Control
- Policy and Performance
- Property
- Public Health
- Registration and Coroners
- Transport and Infrastructure
- Waste Management

Activity Level



Transaction Level

Information Management | Corporate File Plan | Global Navigation | My OneDrive | StaffsSpace | Training and Support | Guides

FI **Freedom of Information**

Not following | Site access

Home
Guidance
Procedures
Requests
Templates
Transparency Data

Edit

Retention labelling

New | Page details | Preview | Analytics | Published 2/13/2025 | Share | Edit

Add new item | Edit in grid view | Share | Copy link | Export to Excel | All Items

Title	Record Information	Retention	Retention Applied	Permission Group
Guidance	Guidance	Manual delete once superseded/no longer required. Business agreed retention period	Manually	SP-IMAI-RWC
Procedures	Procedures	Manual delete once superseded/no longer required. Business agreed retention period	Manually	SP-IMAI-RWC
Requests	Requests	Delete 7 years after date last modified. SCC business need.	Automatic	SP-IMAI-RWC

Function level



SharePoint | Search across sites

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Staffordshire County Council

Corporate File Plan

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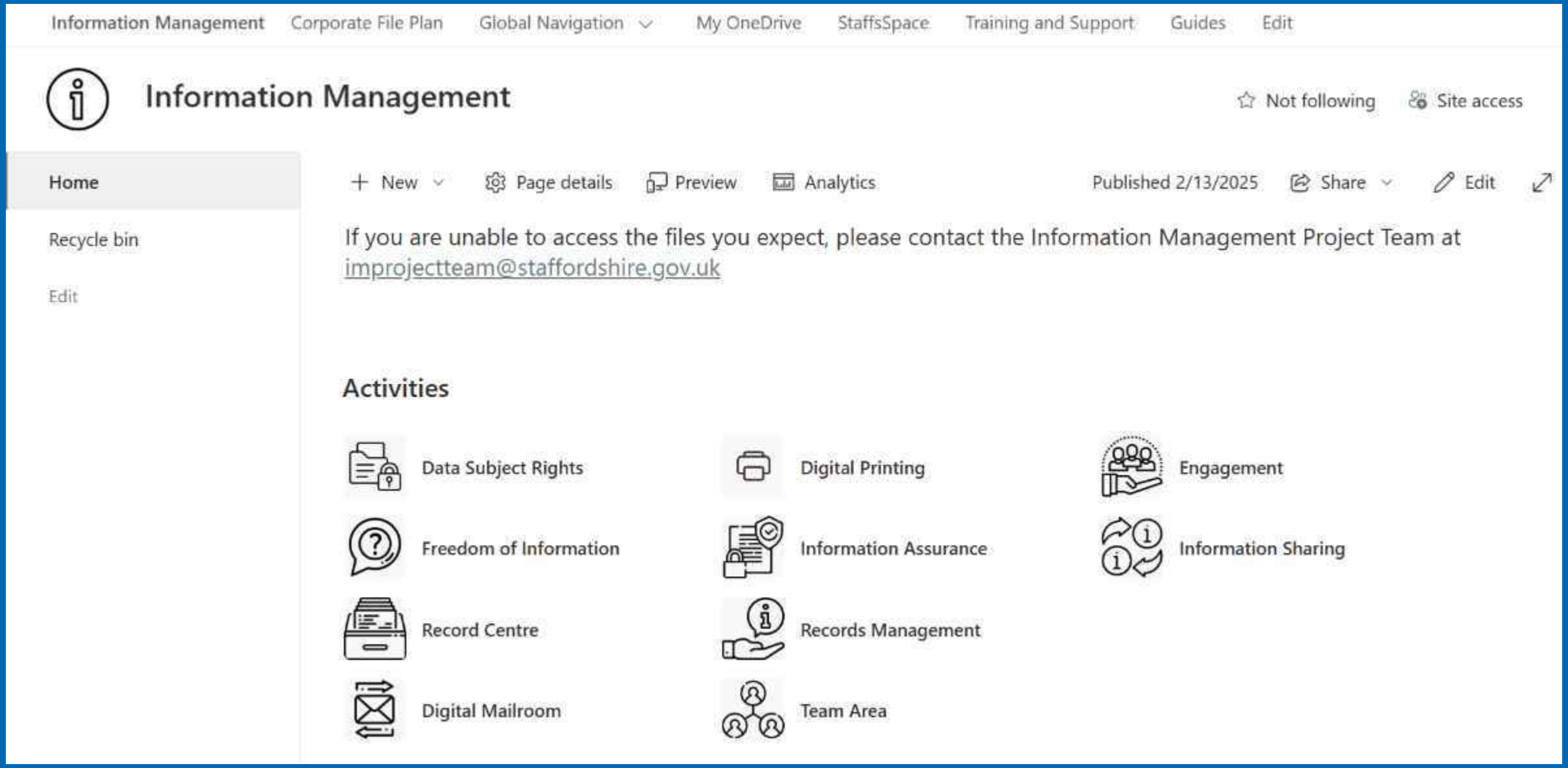
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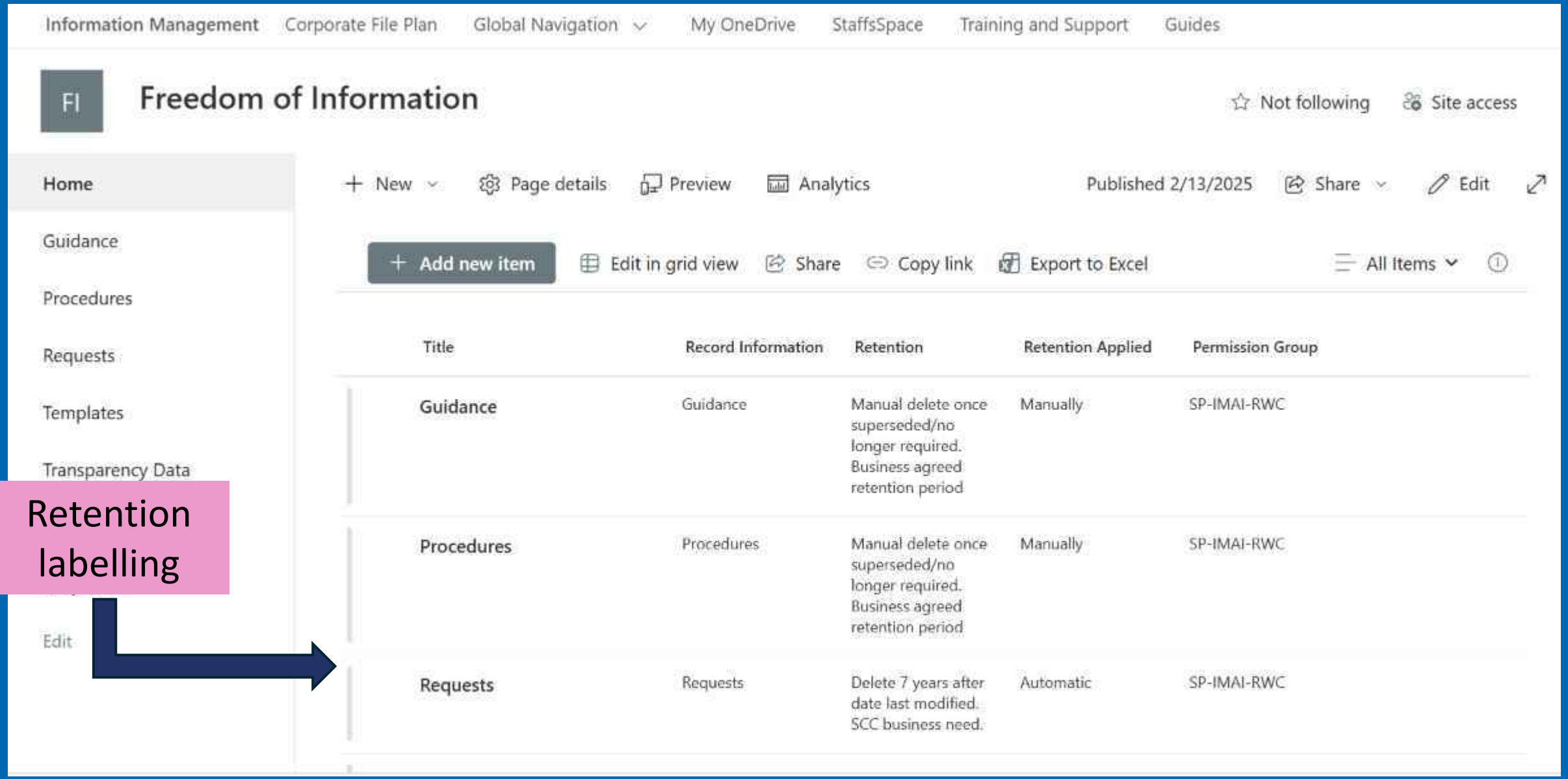
Activity Level

www.staffordshire.gov.uk



Transaction Level

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Retention labelling

04 Lessons Learned

🏆 Success Factors

- Strong leadership and clear sponsorship/buy in from senior management.
- Early and ongoing engagement with end users to ensure cleansing and buy-in.
- Flexibility to adapt the approach as the project evolved.

⚠️ Pitfalls to Avoid

- Underestimating the time and resources required for change management.
- Wide spectrum of digital skills.
- Failing to address legacy behaviours.
- Overlooking the importance of training and support continual updating and in different formats for learners

💡 Top Tips

- Start with a clear vision – the ‘why’ - communicate it widely at all levels.
- Do not assume understanding!
- Robust project set up with tech, RM and cultural change expertise.
- Celebrate quick wins to build confidence and demonstrate value – resilient, determined team.

05 Outcomes

🎯 Benefits

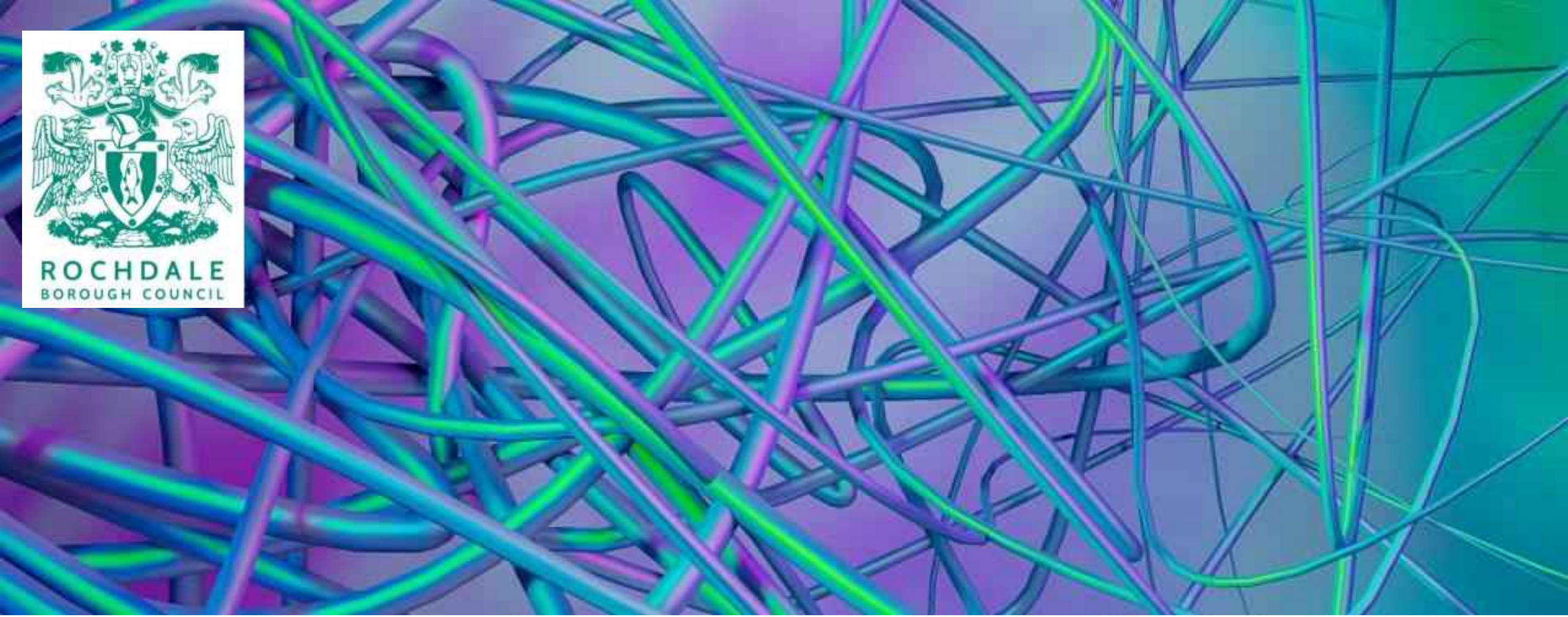
- Improved compliance with best practice and legislation.
- Greater staff confidence in managing and locating records.
- Enhanced productivity and collaboration through standardised processes and tools (including Microsoft 365 adoption).
- Reductions in risk and operational inefficiency.

🏢 Organisational Change

- Better positioned to support digital transformation and respond to future challenges.
- Staff are more engaged and empowered to manage information effectively.

📈 Continuous Improvement

- Continued embedding of system and RM best practice.
- Ongoing training, monitoring, audit, feedback mechanisms to ensure sustained effectiveness.
- Commitment to ongoing effectiveness and compliance through regular review and adaptation.



Rochdale Borough Council
Corporate File Plan Journey

Nicola Trainer – Project Manager

Key Challenges

- 52TB of unstructured data across 15 servers encompassing over 83,000,000 files
- Little or no clear governance in place with 80% redundant or duplicate data
- Huge digital skills gap across the organisation
- Internal resource gap – hindering effective adoption of SharePoint



Why External Support?

Need for Expertise

Went beyond technical delivery but also to address organisational complexity

Driving Cultural and Behavioural Change

External support facilitated cultural transformation critical for success





Delivery in Practice

Marathon not a Sprint!

Piloting and Feedback is key

Pilot teams used, staff feedback collected to enable quick adjustments and improvements.

Balancing Culture and Technology

Addressing both cultural and technical changes was key to organisational acceptance, training and clear communication is vital.

Stakeholder Engagement

Active stakeholder engagement were vital – buy in from the top.

Outcomes

Seamless collaboration across the organisation

A new, detailed and fit-for-purpose corporate file plan incorporating over a 70% reduction in data storage. This includes agreed permissions with built-in retention and disposal policy, all deployed within the authority's SharePoint space.

Improved Adoption and Compliance

Achieved stronger Microsoft 365 adoption, compliance improvements, and empowered staff to use tools efficiently, enhancing productivity and engagement



Reflections & Advice



Understand Working Practices

Investing time upfront to understand real working practices is crucial for successful transformation.

Tailored Department Solutions

• Each department required customised architecture - one-size-fits-all approaches proved ineffective in transformation.



Value of External Support

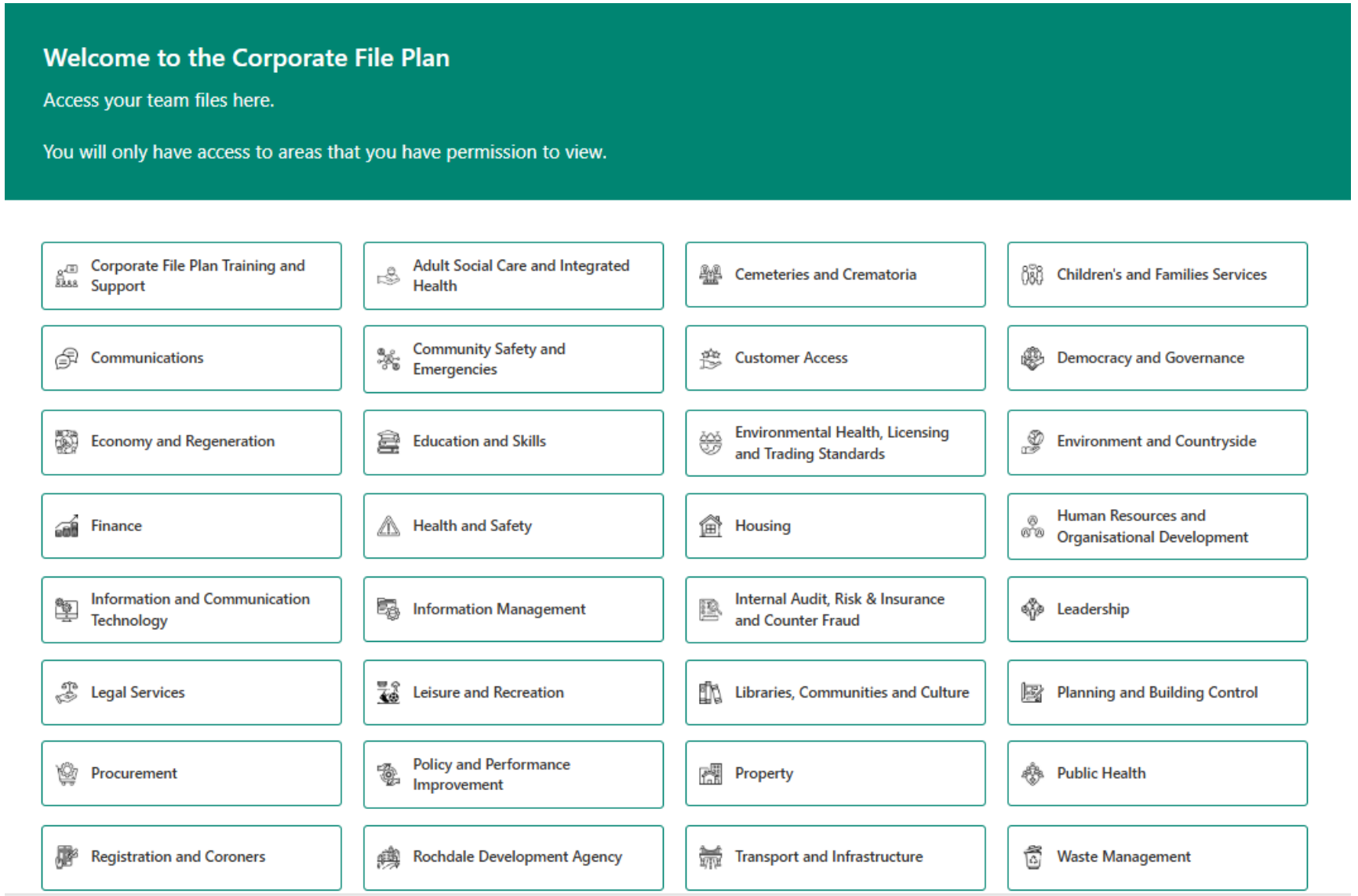
External partners help identify blind spots and provide strategic guidance during transformation.



Early Engagement Advice

Engaging external partners early maximizes impact and drives meaningful organisational change.

Quick Demo of IMS



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PANEL Q&A

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