| Committee(s): Policy and Resources Committee – For Information | Dated: 11/04/2024 |
|---|---|
| **Subject:** Improving the City Corporation's Tracking of Member Skills and Expertise | **Public** |
| **Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly?** | 8, 9 |
| **Does this proposal require extra revenue and/or capital spending?** | **N** |
| **If so, how much?** | **N/A** |
| **What is the source of Funding?** | **N/A** |
| **Has this Funding Source been agreed with the Chamberlain's Department?** | **N/A** |
| **Report of: Gregory Moore, Deputy Town Clerk** | **For Information** |
| **Report author: David Mendoza-Wolfson, Office of the Policy Chairman** | |

## Summary

This report presents the current procedure around the capture of Members' skills and interests. It outlines how officers will ensure that this information is regularly updated and assesses how we can improve in keeping information accurate and reflective of Members' skillsets.

The report acknowledges that improvements can be made to the procedure, for example by refreshing the list of Member skills and expertise with updates, so that better informed decision making can take place e.g. as regards invitations to attend or represent The City at functions and events.

The report is being brought forward at the request of the Committee and provides an opportunity to refresh our practices ahead of the March 2025 Common Council elections.

## Recommendation(s)

Members of the Policy and Resources Committee are asked to:

- o Note the report.

## Main Report

### Background

1. Though it has undergone iterative updates, with most recent revisions being made ahead of the March 2022 all-out Common Council elections, the current method through which Member skills and expertise are captured and collated has gone largely unchanged for several years.

2. Following a question asked by Alderman Hailes at the Policy and Resources Committee meeting on 16 November 2023 about how the City Corporation captures this information, the Policy Chairman agreed to have the issue investigated by Officers.

**Current Position**

3. Upon taking office, each newly elected Member is contacted by the Governance and Member Services Team and asked to complete several forms – one of these concerns their skills and experience. Forms are returned to the Governance Team; information captured is then made available to Event Officers in Innovation and Growth, the Remembrancer's Department and Mansion House who call upon such information most frequently.

4. The information is stored on the CityDynamics CRM system, which is accessible to City of London's staff members with an active licence for it, namely officers in Innovation and Growth, Remembrancers, Office of the Policy Chairman, Mansion House and Corporate Affairs. CityDynamics is a heavily customised version of Microsoft Dynamics CRM, where a database of organisations and contacts that engage with the City of London's principals (namely the Policy Chairman and the Lord Mayor) are saved, capturing interactions that the five departments above have with these external stakeholders. This system also has a separate Events environment which shares the same database and through customisation allows the management of events (from invitation to reporting) for the departments mentioned above.

5. The present form has nineteen expertise categories, agreed in consultation with Officers in Innovation and Growth and the Remembrancer's Department, and an 'other' box allowing for free text and for Members to capture themes which they feel are not adequately covered by the categories articulated. This had led to the proliferation of interests being listed, alongside expertise, and of a list that has grown stagnant due to a lack of regular updates. For example, in addition to City Corporation-led priority areas such as Financial Services and Economic Crime, the current form also lists a wide range of potential interests such as skiing, cookery and classical civilization. Appendix 1 provides an indicative list of some of the categories currently included.

6. The "Lighthouse" project, led by colleagues in Digital Information Technology Services (DITS), evaluated data and processes within the City of London Corporation with the assistance of external consultant Hitachi Solutions, who conducted workshops focusing on customer experience, data quality, and system efficiency. Hitachi Solutions identified disjointed tools, time-consuming processes, and risks related to data duplication within the City Corporation, highlighting the need for modernization. The proposed solution involves implementing a unified CRM system and leveraging Microsoft technologies to enhance stakeholder management, with ongoing consultation to align with the Corporate Plan 2024-2029 and Digital Strategy.

**Proposal**

7. Currently, details of skills and expertise are only requested upon a Member's election; reminders to update their information are published on the Member's portal. To keep information more accurate and up to date officers will create a digital form that will be circulated to all Members on a twice-yearly basis encouraging them to review and update their initial submissions. Once a year, this will be sent out alongside their annual declaration of interests. It would also be worth better highlighting to all that this is to be considered as a 'live document' to which they may make amendments at any time by notifying relevant Officers. This will allow the Corporation to keep track of Member skills and expertise more dynamically, capturing new expertise on a rolling basis.

8. A new, digital, list will be built, informed by – but distinct from – the current list (as found in Appendix 1). *The first version of this list will be complete by the 9th of May, 2024.*

9. This new form contains preset "Categories" and "Sub-Categories" for Members to select.

   a. e.g. A "Category" might include "Financial Services" and could contain sub-Categories such as "Accountancy", "FinTech", "Insurance".
   b. Alongside these Subject Matter Categories (e.g. Financial Services), there will also Country Categories, to understand Members' country specific expertise

10. There will also be one 'other' box for inserting text for if a Member believes that a sub/category that should be listed, is. The information entered into the 'other' box, will be used to feed into the following year's list following review by officers in Innovation and Growth and the Remembrancer's Department, and other relevant departments most likely to use the list in their day-to-day work.

11. The form will be easily accessible to Members online.

12. This list will then be used by officers to help inform and assist in their recommendations to relevant Committee Chairs, for example, for which Members should be invited to attend or represent the City at particular functions.

**Corporate & Strategic Implications**

Financial and resourcing implications

There would be no financial cost to adopting the recommended option, but some officer time in setting up the new form, distributing, reviewing, and maintaining.

Legal Implications

The information will be held in accordance with GDPR; only stored and used for specific purposes agreed by the Member when providing their personal information.

Risk Implications

None

Equalities Implications

Understanding the skills and expertise of Members will help ensure that there is a greater equality of opportunities for Members, based on their specific skills and expertise rather than their longevity on the Court or other factors that may not be as objective in matching Members with positions or functions.

Climate Implications

None

Security Implications

None

**Conclusion**

13. Updating the way that the City Corporation collects, collates, and refreshes data on Member skills and expertise will improve how the Corporation engages with Members and ensure that the organisation is appropriately represented within different forums. A twice-yearly updated digital form will ensure greater quality in information. This will help to determine, for example, which Members should be invited to attend particular, issue-specific, functions as invitations are made available.

**Appendices**

**Appendix 1:** List of current categories


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## Appendix 1

## Indicative List of Member 'Skills and Interest'

- Animal Welfare
- Architecture
- Art & Culture
- Asset Management
- Banking
- Business
- Charity & Volunteering
- Competitiveness
- Conservation
- Defence
- Disability
- Diversity
- Education
- Employment
- Environment
- Financial Services
- Foreign Affairs
- Forestry
- Housing
- Legal
- LGBT
- Local Government
- Mental Health
- Music

- Open Spaces
- Policing & Economic Security
- Property
- Risk Assessment
- Science & Technology
- Skills & Training
- Social Mobility
- Sport
- Sustainability
- Theatre
- Tourism
- Trade
- Transport