

<b>Committee(s)</b>	<b>Dated:</b>
Public Relations & Economic Development Sub-Committee	25 July 2018
<b>Subject:</b> Strategic Engagement and Events Management applications for City Dynamics update	<b>Public</b>
<b>Report of:</b> Director of Economic Development	<b>For Information</b>
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### Summary

This report provides an update to this committee of the progress on the Strategic Engagement and Events Management (SEEM) applications for City Dynamics. Technical development has continued, and applications are on target to launch at the end of August. This development has included designing in GDPR compliance by default. Training is being developed to be delivered in August and September to support users to use the new platform effectively and in accordance with data protection protocols. In parallel, a data cleansing and migration exercise is being undertaken to ensure only high-quality data is transferred to the new platform.

### Recommendation

- Members are asked to note the progress of the City Dynamics project.

### Main Report

1. The SEEM application on the City Dynamics platform offers significant opportunities across the teams who will be using it: Remembrancer's, Corporate Affairs, Mansion House and EDO. In contrast to the current CRM platform, which is ineffective, inefficient and a significant data protection risk to the Corporation, the new platform and application, if effectively established, will deliver the following benefits:
  - **Data security:** encouraging GDPR compliance by default, greatly reducing the risk of non-compliance for strategic engagement and events management.
  - **Data quality:** assigning an administrative record owner to each record, supporting accuracy, and automatically applying a new retention policy.
  - **More effective and efficient Events Management:** providing an end-to-end Events Management tool, increasing effectiveness and efficiency.
  - **Coordination across Strategic Engagement and Events Management:** for the first time, managing strategic engagement and events management through one platform.
2. The new platform will support the current 'grid' system led by the Corporate Affairs team, enable high quality briefing, and reduce duplication. It will also allow targeting of engagement and invites using analysis of our data. It will also enable officers to better brief members. In line with the principles of value for money, current approach

and with GDPR, the number of officer users is being kept focused and, through these officers, members will be provided with analysis and reporting as appropriate.

3. Some questions still remain on what data to request/retain, in a way compliant with GDPR. In the case of data on protected characteristics (which are mostly classed as more sensitive 'special category data' under GDPR), the Diversity Working Group will discuss the City Corporation's approach.

### **Update on progress**

4. The addition to the project team of the project manager has stabilised the project and clarified deliverables and dependencies. The City Dynamics Governance Board has provided an effective structure for oversight of the project. The technical development of the new platform and application is on track for the launch date of 28 August. The platform will continue to be tested by users in July and August.
5. The new platform has been designed with features to ensure compliance with GDPR by default, according to a data privacy approach agreed with the Comptroller's team and signed off by Summit Group. This includes:
  - The automatic sending of a data privacy notice to contacts
  - When a new record is added, the user adding that record will be required to undertake a 'legitimate interest assessment' to ensure that the City Corporation has a lawful basis, under GDPR for holding that data.
  - A retention policy will be automatically applied to records
6. A similar approach, combining training and data health-checks, has been recommended for handling Freedom of Information (FOI) requests.
7. The consultation on the proposed changes to the CRM function approved by PRED, P&R, RA Sub, Finance and Establishment committees is underway. As approved by those same committees, a transition team is being established. This team will deliver the transition to the new platform whilst the current CRM function continues to manage the current CRM under the management of the Assistant Town Clerk.

### **Forward Plans**

8. Configuration of the SEEM application will be completed over July and the start of August. In parallel, processes and protocols are being developed to ensure effective and joined up use of the new application. Users will then be trained in August in how to use the new application and apply these processes and protocols. A phased launch is planned for the end of August and into September:
  - For strategic engagement users, there will be rapid rolling programme of training and on-boarding.
  - For events management, teams will test the new platform on a series of live events across the Autumn, to ensure full functionality before full adoption of the platform for the highest profile events hosted by the City Corporation.

**Recommendation**

Members are asked to note the progress of the City Dynamics project.

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