

National Lottery Heritage Fund lays groundwork for a modern approach to grant funding

Civica's data discovery exercise helps the National Lottery Heritage Fund prepare for a move to a new investment management system.

Investment data: the Fund's most valuable asset

The National Lottery Heritage Fund is the largest dedicated grant funder of the UK's heritage. Since 1994, the Fund has awarded over £8 billion to more than 44,000 projects across the UK. Investment grants ranging in value from a few thousand to several million pounds are used to fund heritage projects relating to culture, history, communities and nature.

To manage the lifecycle of each grant from expression of interest (generally made using an online portal) through to project completion, the Fund's investment managers use a customised case management tool.

In use since 2008, the tool is due to be replaced by a new investment management system built on a cloud based platform. This will allow the Fund to overcome various challenges with the current tool including aging technology, inflexible business flows core to the existing system that are out of step with the Fund's current business model, and limited ability to interrogate the data about the projects in which it invests.

"Our investment data is a significant organisational asset," says Tom Walters, Head of Research, Data and Insight. "We want to use it more fully to support decision-making and help us achieve our funding framework goals."

Understanding the current data landscape

Before starting the migration, the Fund needed to fully understand the scope, nature, quality and storage locations of its current investment data.

"Civica already support our case management tool and are familiar with how it works," says Jamie McGarrigle, Product Owner at the Fund. "We knew we could count on a transfer of knowledge about the tool, including its structure and how it performs calculations, to further support our migration planning."

Civica consultants started by identifying the additional data repositories used alongside GEMS —SharePoint, a reporting database, and a number of linked external systems —and classifying the data as structured, semistructured and unstructured.

Key outcomes:

4.6m

rows of data in GEMS system

1.7m

documents analysed for migration

60

project days

"The data discovery exercise is a value-for-money engagement that's helped us really understand the bigger picture in terms of our data. We're delighted with the outcome."

Tom Walters, Head of Research, Data and Insight, National Lottery Heritage Fund

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At the end of the engagement, the Civica team provided the Fund with:

- A conceptual model of the data in scope for migration, with physical data models of the source systems
- Analysis and visualisation of application workflows to inform decisions about handling in-flight projects during the migration
- A map of the links between systems, including the SharePoint libraries of unstructured data
- A data quality monitoring framework configured with 160 tests to help identify inconsistencies
- Recommendations on next steps for the migration strategy, including handling of semi-structured and unstructured data.

Managing unstructured data

"The data discovery exercise is a value for money engagement that's helped us really understand the bigger picture in terms of our data" says Tom. "We're delighted with the outcome. It's given us the confidence to develop our data migration strategy. "Throughout the life-cycle of each project the Fund invests in, a lot of unstructured data (documents like invoices, payment request forms and photos) gets added to the case file.

Civica helped the Fund to understand the benefits of replacing the existing storage repository (previously a SharePoint library) with a metadata approach, or using a combination of the two.

"Many of these documents contain critical financial information, so transferring them successfully and keeping them accessible is a key part of the overall migration project," says Jamie. "Civica's knowledge of these tools and platforms helps us to understand how to make that happen in practice."

Improving data analysis and reporting

Improving data analysis and reporting The Civica team recommended implementing a data warehouse to help the Fund address its challenges around analysing and reporting on investment funding. With the current case management tool, the Fund is restricted to reporting dashboards that depend on static data extracts. To meet the Fund's current reporting needs, Civica created a pilot of the data warehouse using Power BI, Azure Data Factory and Azure SQL. Once the new investment management system is up and running, it will feed data into the data warehouse.

"The limitations of the dashboard approach mean we've never had complete trust in our data," says Tom.

"Combining the investment management system with a data warehouse will massively improve our analysis and reporting capabilities by giving us visibility of all our data, and allowing us to manipulate it in real time to gain the insights we need."

Outcomes

- Clarity around the data in scope for migration and the links between data repositories
- Visualisation of application workflows to support decisions about migrating the data for in-flight projects
- Identification of data inconsistencies through a data quality monitoring framework
- Recommendations on next steps for the Fund's migration strategy, including integration with a data warehouse for improved reporting.

"The Civica data discovery engagement has given us a great foundation for our migration strategy, and we look forward to collaborating with them on the next steps."

Jamie McGarrigle, Product Owner, National Lottery Heritage Fund



What comes next?

Civica are now collaborating with the Fund to deliver the approach outlined in the Migration Strategy; activities are under way for document migration, structured data mapping & migration, and data quality remediation activities are all happening in parallel with the Fund's in-house IMS development. "There's still a lot to do, but we're definitely getting there," says Jamie. "The Civica data discovery engagement has given us a great foundation, and we're looking forward to collaborating with them on the next steps."

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