

Shadow Executive (Cabinet)

Title of Report:	Recommendations of the St Edmundsbury and Forest Heath Overview and Scrutiny Committees: 9 and 10 January 2019 – Customer Access Strategy 2019-2022	
Report No:	EXC/SA/19/008	
Report to and date:	Shadow Executive (Cabinet)	5 February 2019
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Purpose of report:	On 9 and 10 January 2019, both St Edmundsbury Borough Council and Forest Heath District Council's Overview and Scrutiny Committees considered Report Nos: OAS/SE/19/003 Appendix A / OAS/FH/19/002 Appendix A which contained the revised Customer Access Strategy covering the period 2019-2022. The Committees have put forward the following recommendation to the Shadow Executive (Cabinet) for approval.
Recommendation:	It is <u>RECOMMENDED</u> that the Customer Access Strategy 2019-2022, as contained in Appendix A to Report Nos OAS/SE/19/003 and OAS/FH/19/002, be approved.
Key Decision: <i>(Check the appropriate box and delete all those that do not apply.)</i>	<i>Is this a Key Decision and, if so, under which definition?</i> Yes, it is a Key Decision - <input type="checkbox"/> No, it is not a Key Decision - <input checked="" type="checkbox"/>
Consultation:	<ul style="list-style-type: none"> • See Report Nos: OAS/SE/19/003 and OAS/FH/18/002
Alternative option(s):	<ul style="list-style-type: none"> • See Report Nos: OAS/SE/19/003 and OAS/FH/18/002
Implications:	
<i>Are there any financial implications? If yes, please give details</i>	Yes <input type="checkbox"/> No <input type="checkbox"/> <ul style="list-style-type: none"> • See Report Nos: OAS/SE/19/003 and OAS/FH/18/002
<i>Are there any staffing implications? If yes, please give details</i>	Yes <input type="checkbox"/> No <input type="checkbox"/> <ul style="list-style-type: none"> • See Report Nos: OAS/SE/19/003 and OAS/FH/18/002
<i>Are there any ICT implications? If yes, please give details</i>	Yes <input type="checkbox"/> No <input type="checkbox"/> <ul style="list-style-type: none"> • See Report Nos: OAS/SE/19/003 and OAS/FH/18/002
<i>Are there any legal and/or policy implications? If yes, please give details</i>	Yes <input type="checkbox"/> No <input type="checkbox"/> <ul style="list-style-type: none"> • See Report Nos: OAS/SE/19/003 and OAS/FH/18/002
<i>Are there any equality implications? If yes, please give details</i>	Yes <input type="checkbox"/> No <input type="checkbox"/> <ul style="list-style-type: none"> • See Report Nos: OAS/SE/19/003 and OAS/FH/18/002

Risk/opportunity assessment:		<i>(potential hazards or opportunities affecting corporate, service or project objectives)</i>	
Risk area	Inherent level of risk (before controls)	Controls	Residual risk (after controls)
See Report Nos: OAS/SE/19/003 and OAS/FH/18/002			
Wards affected:		All West Suffolk Wards	
Background papers: <i>(all background papers are to be published on the website and a link included)</i>		St Edmundsbury: OAS/SE/19/003 Appendix A Forest Heath: OAS/FH/19/002 Appendix A	
Documents attached:		None	

1.1 **Key issues and reasons for recommendation**

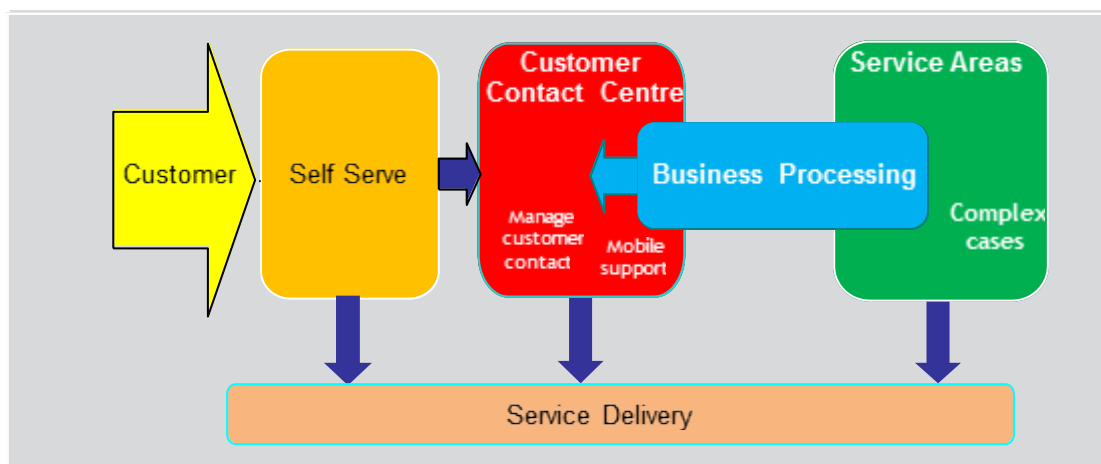
1.1.1 Both Committees received the above reports which contained the revised Customer Access Strategy covering the period 2019-2022. Subject to approval, the Strategy will come into effect from 1 April 2019 following the creation of West Suffolk Council.

1.2 **Background**

1.2.1 The West Suffolk Councils adopted the Target Operating Model (TOM) for Customer Services (see Diagram 1 below) in 2014, marking a fundamental change to the delivery of the Customer Services function across both Councils. The motivation at the time of the implementation was to reflect the ambition to move to a single council in structure terms and to acknowledge the requirements associated with the public sector digital transformation agenda.

1.2.2 The general focus at the time of the implementation was to understand which of the Councils' services could be drawn into the TOM and how best to deliver those against the backdrop of efficiency improvements aimed at releasing financial savings associated with the changes (£125,579 per annum). Note that these financial savings were achieved.

Diagram 1: Customer access target operating model



1.3 **Headlines from the post-implementation review**

1.3.1 In April 2018, a review of the initial strategy objectives was conducted. Given that the purpose of the TOM was to create a system which would provide clear, accurate, timely, accessible and targeted information to customers across a range of service disciplines and across the two Councils, the review considered how successful the channel shift work has been since starting to implement the change. The aim of the TOM is to ensure that customers can self-serve as much as possible with customer service staff providing assisted self-serve, further supported by service areas dealing with the more complex issues.

1.3.2 A key driver to achieve the Strategy was the ambition to achieve a 20% channel shift to move customers from a direct contact method to online and self-serve. In November 2012 a data capture exercise conducted at the time showed that the main methods of contact were telephone and face-to-face,

accounting for around 369,000 customer contacts. A key part of the delivery of the TOM was to transfer staff into one Customer Service team. This team now consists of 34 staff (26.97FTE) and works across Bury St Edmunds, Haverhill, Mildenhall and Newmarket. Suffolk Library Services provide the support from the Brandon Office.

1.4 **Review of achievement of project objectives**

- 1.4.1 With an objective to achieve a 20% channel shift from direct contact to online channels and self-serve methods (amounting to around 85,000 contacts), Report Nos: OAS/SE/19/003 / OAS/FH/19/002 summarised the data captured that had been used to analyse whether this objective had been achieved. The figures indicated a considerable shift in customer contact methods, with online and self-serve methods representing 21.5% of the total customer contacts for 2016/17, increasing to 25% in 2017/18
- 1.4.2 Between 2013/14 and 2017/18 phone calls to the customer service team have reduced by 27.2% (61,410 calls) and face to face volumes have reduced by 70% (100,894 visits) as online options increase.
- 1.4.3 There is further evidence of channel shift in the most recent website analysis, providing information about the number of online users in comparison to telephone and face to face contact with the Councils. The analysis highlights that since January 2015 there are an increasing number of web users compared with an overall decreasing number of face-to-face contacts. Analysis from 2017/18 is showing a stabilisation of face-to-face contact levels with phone call levels remaining at a similar level over the period.
- 1.4.4 Generally speaking face-to-face contact has diminished considerably over the recorded period, with a general decline in the number of calls being made to the Customer Services team. Website use, having initially increased in the period between March 2016 - July 2017, is now settling into a more consistent level of attracting between 30,000-40,000 web users per month (having peaked at almost 50,000 in March 2017).

1.5 **Future Customer Access Strategy**

- 1.5.1 It is with this review that it is evident there is much to celebrate in terms of the ongoing success of the TOM and equally work that needs to be continued in order to unlock the full potential of the model, given the technological advances since the TOM was first construed in 2012.
- 1.5.2 The work carried out to review the 2015-2018 Customer Access Strategy has considered technology as a key element of the future provision of customer access for West Suffolk Council customers. The practical day-to-day improvements will continue to deliver the now well-tested model for managing customer contact, whilst being careful to allow the future technological environment to shape the way in which the council manages customer demands in the future. Important in this iteration of the strategy is the clarity that there is no set pathway being followed at this time in terms of what the future will look like, instead recognising that with the market changing so rapidly, it is better to understand fully our emerging needs (based on an assessment of future opportunity and previous learning).

1.6 **Consideration for West Suffolk Council**

- 1.6.1 In producing the 2019-2022 Strategy which was attached as [Appendix A](#) to the Overview and Scrutiny Committee reports, a focus has been placed on ensuring that the approach is flexible enough to deliver against the ambition and any emerging priorities of the new Council. There is of course going to be a period of transition post April 2019 and the Strategy needs to be able to accommodate changes required by the new Council members. This Strategy does this and, more importantly, provides stability; the stability being provided by the commitment to deliver more of the same and to take time to reflect the requirements for the customers and the service areas before making a decision about system updates or changes.
- 1.6.2 Alongside the strategy document, staff have reviewed the existing Service Standards document and also updated the existing Complaints Policy which now also includes a section on the management of vexatious and persistent complainants. Both of these documents are available to view on the website.
- 1.6.3 The Strategy is accompanied by an action plan which sets out the specific activities associated with the strategy, who owns the actions and anticipated timescales.

2. **Overview and Scrutiny Committees**

- 2.1 Both Overview and Scrutiny Committees scrutinised the report and asked a number of questions to which officers duly responded. In particular, discussions were held on the excellent percentage rate of 98% of the 479 persons that had responded to a survey had been satisfied with the customer service they had received (as reported on a quarterly basis to the Performance and Audit Scrutiny Committees); the navigation of the website; the establishment of the new West Suffolk Council's Twitter Feed; and ensuring the Council continues to liaise with other public services to ensure that work to digitise services does not result in customers contacting other service providers about Council activities and services.
- 2.2 Whilst recognising and reinforcing that face-to-face contact must be maintained for those in need or who cannot access digital services, both Committees considered the new Strategy satisfactorily addresses the issues of improving the customer experience and using new technology to make things easier and better for all. The Strategy demonstrates an understanding about demand and expectation as well as appreciating how technology can be used to integrate services within the Council and their partners.
- 2.3 The Overview and Scrutiny Committees have put forward the recommendation set out on page two of this report.

3. **St Edmundsbury Overview and Scrutiny Committee Meeting Minutes – 7 November 2018 : Note to Shadow Executive (Cabinet)**

- 3.1 As there is no general report being presented from the Overview and Scrutiny Committees to this meeting of the Shadow Executive (Cabinet), the following note is presented as a footnote to this report.

- 3.2 On 9 January 2019, St Edmundsbury's Overview and Scrutiny Committee considered the minutes of its previous meeting held on 7 November 2018, for confirmation. Following some discussion and deliberation, the Committee made a minor amendment to one of the recommendations that it had already presented to the Shadow Executive (Cabinet) on 27 November 2018, for approval.
- 3.3 The recommendation emanated from the Committee's consideration of its appointed Task and Finish Group's final report on the Review of Bury St Edmunds Christmas Fayre (Report No: OAS/SE/18/032 refers) and had been presented to, and subsequently approved by, the Shadow Executive (Cabinet).
- 3.4 The minor amendment is shown in bold, italics below, which has not materially affected the substance of the decision of the Shadow Executive (Cabinet), and the addition has been positively received by the Shadow Executive Members with the responsibility for the Christmas Fayre:

That the Christmas Fayre Review Reports: (OAS/SE/18/032) and (OAS/FH/18/031), including the revised Three-Year Action Plan, attached as Appendix F to Report No: EXC/SA/18/017, be approved, subject to:

*"An Annual Report on the Christmas Fayre being presented to the Overview and Scrutiny Committee, and specifically in 2019, to report back on discussions with the Destination Management Organisation, **Bury St Edmunds Town Council** and the BID (Our Bury St Edmunds) on willingness; desire of businesses to have/provide additional Christmas stalls throughout the town, over a longer period to create "Christmas in Bury".*

- 3.5 The Shadow Executive (Cabinet) is requested to **NOTE** this position.