



MEETING OF THE ENGAGEMENT DEVELOPMENT AND SCRUTINY PANEL

WEDNESDAY, 18 OCTOBER 2006 1.00 PM

PANEL MEMBERS PRESENT

Councillor Conboy
Councillor Nadarajah (Vice-Chairman)
Councillor M Taylor (Chairman)

Councillor Webster
Councillor Mrs Williams
Councillor Wood

OFFICERS

Scrutiny Officer
Service Manager, Customer Services (note 110-114)
Service Manager, Business Transformation and
Information Management (note 110-114)
Service Manager, Democracy (note 110-115)
Service Manager, HR and Diversity (note 110-116)
Scrutiny Support Officer

In honour of the late Councillor Wilks, the panel observed a minute's silence at the start of the meeting.

110. MEMBERSHIP

The panel was informed that Councillor Wood would be arriving later in the meeting to replace the late Councillor Wilks, for this meeting only.

111. APOLOGIES

Apologies for absence were received from Councillor Shorrocks.

112. DECLARATIONS OF INTEREST

There were no declarations of interest.

113. GATEWAY REVIEW 1: CUSTOMER SERVICES

As an introduction to this and the following item, it was explained to the panel that the current service plans were titled "Access and Customer Services" and "ICT Services" whereas the 2007/08 service plans would be for "Customer Services" and "Business Transformation and Information Management", as a result of the management restructure.

The Customer Services Manager then proceeded to give a presentation on the Customer Services plan.

- The telephony centre had been set up in August 2005 and customer relationship management (CRM) software was in use for a range of services and already proving its value. Other services were also dealt with by the telephony centre but were awaiting business process re-engineering (BPR) to enable delivery via the CRM.
- The introduction of Allpay had reduced cash handling and the banking hall function as planned.
- The customer service centre would be opening in November 2006.
- Further work to be carried out included the transfer of remaining services from the back office, delivery of equal service in the area offices, fully embedded customer service standards throughout the authority, increased training with the Institute of Customer Service (ICS) and improved rates of telephone calls being dealt with at first point of contact.
- To achieve this the service needed to carry out ongoing BPR, with work on Revenues and Benefits starting in November 2006, an ongoing review of services already delivered via the customer service and telephony centres, a recruitment drive for ICS training and awareness raising throughout the authority.
- In relation to Gershon savings, efficiencies had been achieved through BPR and transfer of staff from back offices but specific figures were not yet known.
- Spend was currently matching budget but an increased salary budget would be required for 2007/08 to reflect the integration of customer-facing back office staff.
- Three areas had been identified to reduce risk: smooth transition to the customer service centre, multi-skilling of advisors across all services and realisation of self service aspirations.

Members discussed the presentation with the officer and made the following points.

- Information on Gershon targets needed expanding. The panel was concerned that anticipated progress was not sufficient.
- Some members of the panel did not like the word “weaknesses” in the SWOT analysis section of the plan. The officer was asked to explain what was being done to address the ‘problems’ and threats highlighted in the service plan. He therefore outlined: developing skills set with staff (our biggest strength), significant training, multi-skilling and communication. This would be reflected in the new service plan.
- In relation to the service’s mission statement, the officer was asked how rural areas were being addressed. The officer replied that targets within the current year included working towards the same quality of service within area offices. This would be continued in the future plan including work towards increasing community access points, improved web access and face to face. BPR had enabled front line staff to access customer information thereby increasing the quality of service overall.
- In relation to the performance indicator to answering letters, some members

considered the target to not be challenging enough, although others thought that the quality of response needed weighing up alongside this target. The officer explained that it was cheapest for the council to do business by telephone, then face to face and then letter. The customer service centre was designed to answer customer queries at the first point of contact.

- The telephone response target was for corporate customer-facing telephones, not the switchboard or telephony centre. The latter was operating at very high standards and the former lower standards were being addressed through a telephone protocol.

In relation to the “Access” element of this service plan, the Service Manager for Business Transformation and Information Management made a presentation, as this now fell under his remit.

- The CRM in the customer service centre had been a key piece of architecture for various projects. A lot of work had been done on integration with back office systems so that back offices did not have to duplicate work from the customer service centre.
- BPR skills had been developed in house rather than using consultants.
- Further work needed to be done to achieve full BPR in back offices, all services to be delivered by CRM, target of telephone calls of 80% to be received by the customer service centre and further work on the electronic document records management systems (EDRMS).
- To achieve this, BPR of revenues and benefits would start in November 2006 (this would ensure that all information from customers was captured first time), EDRMS across all areas, continued transfer of services to the customer service centre, realising of efficiency savings via BPR.
- Gershon savings would be achieved from BPR , transfer of services and improved customer service.
- Spend was matching budget and for 2007/08, the access budget would be combined with ICT.
- In relation to risk, there was a need to ensure that there was a return on investment of BPR activities, adapter capability for back office systems, retention of skills and a smooth integration process.

In response to members’ questions, the officer clarified various points:

- Financial information reflecting that the service was within budget would be available at the next gateway review.
- There was little benchmarking information for this service. A balance scorecard in the plan did reflect the value for money of the service.
- Community portals might be transferred to the council’s main website and problems experienced with accessing planning information online should be resolved.

Conclusions:

- (1) Gershon savings for Customer Services (including the “access” element of this plan) to date to be calculated and reported at Gateway Review 2.**

(2) Finance information of budgets and spending to be presented at Gateway Review 2.

114. GATEWAY REVIEW 1: BUSINESS TRANSFORMATION AND INFORMATION MANAGEMENT

The Service Manager for Business Transformation and Information Management gave a presentation on the current ICT service plan, which would be covered by the 2007/08 plan for his service.

- Current work involved delivering IT infrastructure, identifying improvements, helpdesk support, system and server admin, security and resilience of data.
- Future work would include monitoring system down time (should be 95% availability) and more proactive work to resolve problems. This would required implementation of active directory, consolidating servers, which release maintenance and purchase costs, implementation of corporate legers, completing the LLPG long term strategy for every system to use the unique identification number. Progress had been made with enabling remote working. Building control used tablet PCs to enable them to dial in to council systems without coming back to the council offices. EHS were also looking to do this.
- In relation to Gershon savings, the egov agenda had led to investment to website, servers etc. which would result in savings over time. Fixed price extended contracts would also provide savings but these were only used when the section was comfortable with product.
- Spend was matching budget. The merging of access and ICT should not have any significant financial impact.
- There was a risk in any potential loss of knowledge and skills and the integration of the modernisation team may bring about some risks.

This was discussed by the panel.

- A member expressed his concern about the lack of a corporate wide forward plan for corporate systems – a weakness identified in the ICT service plan. The officer explained that historically, the council had not identified how and in what order systems would be replaced. The management restructure and three-year service planning should help to enable better planning.
- The weakness about being “too helpful” had been identified because the service had not been properly prioritising and sometimes taking on too much work.
- The panel considered that the service had come a long way was on track for the future.

Conclusion:

Further information on the Gershon savings were required for Gateway Review 2.

115. GATEWAY REVIEW 1: DEMOCRACY

The Democracy Service Manager presented the current Administrative Services plan. This would become the Democracy Services plan.

- The plan covered committee support, elections, electoral registration and the courier service. It was fundamental to supporting category A priorities. The print room had been transferred to assets and facilities.
- The electoral manager and assistant could not make it to the gateway review as they were training canvassers for electoral registration, as new legislation required two personal visits to every non-responding household. This was indicative of new statutory roles for the electoral registration officer to undertake more proactive work. Further legislation was anticipated in the near future. Gateway review 2 would provide more information on this.
- Proactive work had also been required in other areas of the service following modernisation in 2001. Committee support was no longer responsive minute-taking but underpinned corporate governance and required highly specialised skills. The service was delivered by a very small team. Members' concerns about this were valid; the risks had been addressed by developing the team with multi-skilling but at the second gateway review, the officer would be asking for additional resources in light of this issue.
- Initial results from the recent scrutiny satisfaction survey were circulated.
- The officer explained progress with the service action plan. All action points had been achieved with further achievements, all within existing resources, made in the accreditation of Investors in People, development of local forums, the pioneering of the online citizens jury, the Lincolnshire Scrutiny Officer Network established by this authority, increased number of committee and working group meetings supported, the forthcoming parish council conference and the submitted bid for a parish/town council project worker.
- Members focussed on the risk highlighted in the plan on members' reluctance to give up paper agendas. The officer explained that it currently cost £18,000 per year for printing agendas. The scrutiny support officer added that the access and modernisation working group would be making a recommendation early in 2007 on significantly reducing paper agendas, to take effect from May 2007.
- Performance indicators were being developed for the service, particularly for the scrutiny and electoral elements.
- The Gershon savings were on target and additional savings had been achieved through the absorption of responsibilities and removal of costing of the former Corporate Manager of Democratic & Legal Services. Savings had mostly been achieved from changes to civic arrangements. The service was being delivered within the reduced budget at a very satisfactory quality.

Conclusion:

The panel was satisfied with gateway review 1 of this service.

116. GATEWAY REVIEW 1: HUMAN RESOURCES AND DIVERSITY

The Service Manager for Human Resources and Diversity, who had been in post for eight days, made a presentation on the current service plan. She was comfortable with the general remit of the plan but explained that there had originally been expectations of employment budget devolvement in April 2006 but this was now scheduled for April 2007. In presenting the plan, members asked questions throughout.

- In addition to the key drivers for the service, the management restructure, customer services and the council's pension policy were key factors to be included in the plan.
- The plan highlighted a number of areas where information was lacking on whether customer expectations had been met. The officer explained that there was still a lot of work to do with stakeholder engagement, because time had been taken on other projects. The panel considered it commendable that the plan had been honest in this area and that the service manager was looking to work closer with other managers and staff.
- The key achievements and outcomes in the plan were highlighted. In addition to these, notable success had been achieved in the reduction of sickness levels. The best value performance indicator was excellent and the council currently had sickness levels below the private sector average. It was anticipated that sickness would rise during the winter months. A benchmarking club had been joined to monitor achievements. However, only 41% personal development review forms had been returned for the year.
- The 'SWOT' analysis had been compiled by the team and therefore covered a broad range of aspects of the service. Most of the 'opportunities' identified had been achieved.
- The action plan had been very ambitious and therefore a number of items had to be delayed. Some objectives could only be completed when the management restructure was in place. Amongst those completed was the achievement of level 2 of the equalities standard.
- Gershon savings had been very focused on reduced sickness levels and further work was needed to identify whether target savings would be achieved.
- The officer provided further information on the major procurement for the current year. The employee assistance programme had been very successful with about 5% employees using the service. The medical scheme was dwindling because the occupational health service was better.
- Risk association with workload exceeding capacity had been addressed through tighter work planning and some interim staff measures. The service manager explained that it would not be in the best interests of the service to permanently increase staffing levels because current time-intensive work involved temporary projects such as the management restructure.

There was concern amongst the panel that small teams were being overburdened with work. It was explained that non-category-A priorities, would lose out financially and that staffing was lean throughout the authority. The panel agreed to keep this under review.

Conclusion:

Gershon savings to date to be calculated and reported at Gateway Review 2.

117. CLOSE OF MEETING

The meeting closed at 4.15p.m.