

Report for: Overview and Scrutiny Committee 15-10-19

Item number: 11

Title: Front Office, Back Office Transformation Programme

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Ward(s) affected: All

Report for Non Key Decision

1. Purpose of this report

The intention of this report is to provide the committee with an update on the Front Office, Back Office Transformation Programme since the reports brought to Overview and Scrutiny Committee on the 30-04-19 and 22-07-19.

The report is also intended to provide the committee with reassurance that the programme is achieving its objectives and delivering positive outcomes as well as a deeper understanding of how the programme has benefited from a new collaborative approach to delivery.

The programme welcomes any comments and recommendations from the committee.

2. Content

The report provides the committee with an update of what the programme has achieved in terms of opportunities delivered so far, those being delivered in the next couple of months, and savings realised. It describes some of the challenges that have arisen and what has been learned as a result.

Finally the report explains what will happen next within the programme.

3. Opportunities delivered / being delivered

The programme started with over 100 opportunities that were identified as being possible. The opportunities were then evaluated and prioritised resulting in 70 taken forward for stage 1. The opportunities were then grouped into 6 projects. Each project has both financial and non-financial benefits assigned to

it. Below is a summary of the programme opportunities either delivered already, or to be delivered in the current stage 1, by the end of October 19:

Project	Opportunity Delivered	Opportunity to be delivered
Business Support	<ul style="list-style-type: none"> • New process and eForm for travel requests • New process and eForm for clinical waste requests • New process for paperless Child Protection conferences • New process for paperless information requests 	
Feedback & Information Governance	<ul style="list-style-type: none"> • New internet page and decision tree for Complaints 	<ul style="list-style-type: none"> • Upgraded formal enquiry system for complaints • Improved process for Member's enquiries and freedom & information requests
Revenues & Benefits	<ul style="list-style-type: none"> • New look customer letters re: Council Tax • New document bundling solution for Benefit Appeals Service • New Landlord Portal • New Risk Based Verification policy approved at Corporate Committee (awaiting October Cabinet) • New bulk printing solution 	<ul style="list-style-type: none"> • New Revenues & Benefits automated system • eBilling • New document management system
HR & Finance	<ul style="list-style-type: none"> • New look intranet Recruitment pages • New Disclosure & Barring process 	<ul style="list-style-type: none"> • New staff portal for Finance and HR requests • New HR case management system • New look HR intranet pages and eForms • New Purchase Card process
Digital Customer	<ul style="list-style-type: none"> • New Council Interactive Voice Response (IVR) telephony system • New Council Contact Us pages and online decision trees • New SMS capability • Queue Call Back option for customers • Telephone wrap up codes • New switchboard approach • New customer PCs in service centres • New email management system (emails removed, contact form only) 	<ul style="list-style-type: none"> • New email management (reporting) • Self-scanners in service centres
Housing & Parking	<ul style="list-style-type: none"> • New look rent letters 	<ul style="list-style-type: none"> • New look parking web pages for key contact areas • New look application and

Project	Opportunity Delivered	Opportunity to be delivered
		payment for some permit licences <ul style="list-style-type: none"> • New skip licence process • New mobile App for Estates to submit repairs requests

Appendix 1 provides 5 case studies to show how some of these opportunities have been delivered and the impact and feedback that has been received so far.

In line with our Borough Plan Priorities, specifically “Your Council”, two key outcomes that the programme is aiming to achieve are:

1. An overall reduction in the volume of contacts from customers, and
2. A voluntary move by customers to the more cost effective channels i.e. from face to face, post/email and telephone contacts to online contacts.

These outcomes will enable the reduction in staffing resources that is required to achieve the savings, but also indicates that our customers are having their enquiries resolved in a more efficient way and are not having to contact us multiple times, thereby supporting the Your Council objective of making contact easy for our residents and businesses.

The following table shows the volumes of customer contacts into customer services across the five main channels for last year and the projection for the current year:

Year	Online - My Account	Online - Contact Us	Email and Post	Tel	Face To face	Total
2018-19	479,203	127,620	161,859	354,929	182,738	1,393,971
2019-20	506,786	184,752	131,297	338,187	140,026	1,372,121

This confirms that, even though the changes the programme is making have only been implemented in the last couple of months, the overall number of contacts is reducing and customers are increasingly using online services rather than phone or visit customer services.

Also being delivered within the programme is a new customer platform and ‘Writing for Haringey’ workshops:

a) Customer Platform

As part of the Front Office, Back Office (FOBO) Transformation Programme, a procurement exercise is currently underway to replace the current Customer Platform (My Account) which will fully expire in March 2020.

Background

The Council currently uses the Agilisys Digital system (My Account) to manage its main online customer accounts, dealing with over 110,000 registered users transacting on several services including revenues and benefits. Although there are approximately 16,000 customer transactions through the platform per month, the breadth and depth of services available is limited. The current contract ends on 27th March 2020.

The new platform will significantly improve the digital offering for customers (including Citizens, Businesses, Landlords and other groups), making more council services accessible online, providing customers with better access to services at their convenience, and will fully enable identified savings of circa £300k in Corporate & Customer Services to be delivered with scope for future savings across the Council.

Following a pre-market engagement exercise with a number of suppliers, the project team identified the CCS G-Cloud 11 framework as the best method for procurement of a new Customer Platform. G-Cloud contract length is for a 2 year period with options to extend for up to 2 further 1-year periods.

Four suppliers were initially identified on a shortlist on G-Cloud and attended clarification meetings with the Council.

Current status and timescales

The project team have completed the evaluation of the shortlist suppliers and have identified a preferred supplier. This is being considered by Cabinet on the 8 October. The timescales going forward are as follows (although maybe subject to some minor variation):

- Cabinet meeting (8 October)
- Supplier on site (November)
- Initial phase 1 implementation to replace My Account (January 2020).

b) Writing for Haringey

The Writing for Haringey Workshops have been developed to help staff who regularly write letters or documents to external customers on behalf of the council, or content for the website and intranet, to think about the audience they are communicating with.

They will learn techniques on how to set the tone for each audience and to ensure all content is written in plain English. The training course will be facilitated initially by an external partner and can accommodate up to 60 selected staff members. Eventually the intention is to be able to utilise internal resources to run future workshops.

The first workshop was delivered on 26 September 2019 and the other 3 workshops will be completed by the end of October. Initial feedback from participants has been very positive, both about the trainer and content of the workshop and also about the difference they feel it will make to their approach

to writing reports, internet content and other communications. Some have already recommended attendance to their colleagues.

On completion of these workshops within the programme, an evaluation and recommendation about continuing them will be completed.

4. Savings delivered

The total saving target for the FOBO programme was £4,250k. This was reduced by £740k to reflect a restructure of the finance team which moved them outside of the directorate, and therefore out of scope of the programme.

In 18/19 £250k savings were made through non-staffing reductions. The latest forecast is that opportunities being delivered in stage 1 of the programme for 19/20 will deliver £2,487k savings from staffing reductions and a further £148k savings from non-staffing reductions. This leaves a balance of £625k to be achieved in stage 2 of the programme for 20/21.

Year	£'000	Description
2018 to 2021	4,250	FOBO savings target
2018/19	-250	Non staffing savings
2019/20	-740	Adjustment to savings target
	-2,487	Staffing savings
	-148	Non staffing savings
2020/21	625	Remaining savings target

Some of the savings delivered so far include:

- Customer Services queue call back – providing customers with the option of receiving a direct call back, reducing waiting times to speak to an agent and a reduction in call length has delivered 3-4 FTE savings
- Simplifying layout and rationalising the Contact Us pages on our website to support customers in using digital channels. This includes pages for parking PCNs, Council Tax, Housing Benefits and Customer Services. This has reduced calls and emails to Customer Services resulting in FTE savings.

The previous report to this committee included a verbal update on the staff consultation activities that were underway at the time of the meeting. All consultation has now been completed and the restructures are underway. One issue that was raised during the consultation was in relation to the proposal to delete 2 court officer posts within the revenues service and for the responsibilities to be re-allocated to team leaders within the service. In light of concerns expressed by officers and trade union colleagues an exercise is now underway to review in detail the processes involved and the workloads of both the court officers and the team leaders to ascertain if this proposal is still feasible. The results of the review will be shared with all parties and the proposal revised if necessary.

Work has begun to identify how the remaining savings target will be delivered, and this is explained in section 7 below.

5. Changing the way we change

The approach to programme and project delivery is changing the way the council approaches complex transformation programmes that involve a number of services areas and require many staff to support. While the programme continues to learn and adapt, the key features of the approach include:

- A true collaboration between the programme and receiving services so that all parties have a shared ownership of the success – from officer to AD level
- Fostering a ‘can do’ culture and not being afraid to try things and move on if they don’t succeed
- Using Agile project delivery techniques alongside more traditional methods
- Adopting a rigorous approach to review the benefits of the opportunities being delivered.

6. Challenges and lessons learned

The programme is continually learning and adapting as challenges arise. During the recent sprint (outlined in section 7. below) a ‘retrospective’ or ‘lessons learned’ exercise was conducted taking programme team, service and board feedback on what has worked well, what hasn’t and what needs to be done differently going forward. Some examples of challenges and lessons learned so far include:

- Baseline data – as the programme has moved from opportunity delivery into benefit tracking it has become clear that we would have profited from spending more time at the beginning of the programme to ensure we had all of the baseline data required to be able to identify changes (in volumes, quality etc.) once opportunities were delivered. This thinking is now part of the early planning for any opportunity i.e. the question is asked ‘how will we know and be able to prove that it is successful?’
- Customer engagement – the programme has always taken into account any available information about customer views and satisfaction, but has not been as proactive as it should be to talk to customers about the experience and changes we propose, what is working and what needs to be improved. This would provide access to data and insight from customers to evidence the work we have done. There are many valid reasons for why this hasn’t been done, like the speed of change required, the capacity of the available resources or the expertise required to do this properly. But it is openly acknowledged that it would have been beneficial to spend more time and effort to engage and involve users (residents and staff) in the programme. As part of the planning for stage 2 of the programme discussions were held

about how we could resolve this perceived gap and more detailed plans will be included in the programme definition document being produced in October.

- Roles and responsibilities – feedback from those involved in the programme has highlighted the need for more clarity of roles and responsibilities within programme teams and between the services and the programme. Overall things have worked but we recognise we can continue to strengthen the approach/model to delivering and sustaining change.
- Communication – as always this could also be improved. How, when and who we communicate to. Being more proactive in our communications internally and externally and finding a shared language is particularly important for stage 2 of the programme.

7. Equalities Impact Assessment

The programme completed an EqlA screening tool for residents, with the result being that a full EqlA would not be required at this time for the following reasons:

- The proposal is likely to have no impact on groups that share the protected characteristics or other disadvantaged groups
- We anticipate the proposal to have a positive impact on the service received by service users including residents and visitors to the borough, as the service is being enhanced not reduced
- Should the screening responses change in the future with new proposals, a new screening tool will be completed that may require a full EqlA to be carried out.

A copy of the EqlA for residents screening tool is in Appendix 2

8. Next Steps

As stage 1 of the programme comes to a close (due to complete in November 2019, roadmap included as Appendix 3), planning is underway to develop the opportunities that will form part of stage 2 and deliver the remaining savings target of £625k in 2020/21 as well as further improve the customer and staff experience.

The programme has been collecting potential ideas and, using Agile methodology, has run a 'sprint' to plan the stage 2 roadmap.

The 2.5 day sprint was held in September 2019 and the stage 2 roadmap was drafted. Further work will lead to a programme definition document being produced in October detailing how stage 2 of the programme will be shaped and delivered. This will be presented to the FOBO Programme Board for sign off in November 2019. Following sign off the programme will provide a Members briefing on FOBO.

As well as the planning for Front Office, Back Office stage 2, the sprint explored two other areas of work that will need further investigation:

- Innovation Expansion – to roll out the programme’s successes to other parts of the Council, for example:
 - Web page decision trees – user friendly “big buttons” to navigate to the right place on the Council website to reduce demand and avoidable contact
 - GOVMAIL “style” printing – bulk printing carried out externally to reduce both cost and staff handling time
 - Council wide access to RESPOND (formal enquiry system) – this can enable a new process to reduce staff handling time required to manage enquiries
 - New IVR (telephony) – user friendly telephony system to enable customers to get to the right place and therefore reduce avoidable contact
 - Paperless panels / conferences – to reduce costs and staff handling times
- Haringey Ambition – a set of council-wide initiatives that have been identified to enhance both the customer and staff experience, for example:
 - Staff passport initiative (LinkedIn style intranet page for all members of staff)
 - Data collection, management and insight strategy
 - Online service bookings process
 - Social media and how it is used
 - How we take payments (Use of CallSafe/PayPal on ICON or sStore)

Both of these options will now be explored further in the next planning stages.

Appendix 1: Opportunity case studies

1. Changes to our website - Contact Us Pages

Before:

Haringey LONDON

What do you want to do today? **Go**

Login to My Account
More online services

Services for residents | **Pay, report, apply** | **Business information** | **Local democracy**

Breadcrumb: Home > Contact > Customer Services > Contact Customer Services

Contact Customer Services

- [How to contact us online](#)
- [How to contact us by telephone](#)
- How to contact us in person

How to contact us online

My Account

My Account provides quick and secure access to many self-service options 24 hours a day, 7 days a week. [Login or sign up to My Account](#)

Website

Our website provides useful information about council services. You can access many services online - see our [A to Z Directory of Services](#).

For a speedier response, you can [report problems directly here](#) (rubbish, recycling, graffiti, roads etc), or you can [make a formal complaint/give feedback about a service here](#).

For other non-urgent queries please use the following form.

E-form for Customer Services

How to contact us by telephone

The Contact Centre is open **Monday to Friday, 9am to 5pm** - closed at weekends and bank holidays.

Our Contact Centre advisors only deal with certain service-related enquiries - see the list below.

Telephone numbers and useful links for our main services

- Please note:** your call may be recorded for training and monitoring purposes

Table: Main service contact numbers

Quick links

- [Parking](#)
- [Council Tax](#)
- [Housing](#)
- [Refuse and recycling](#)

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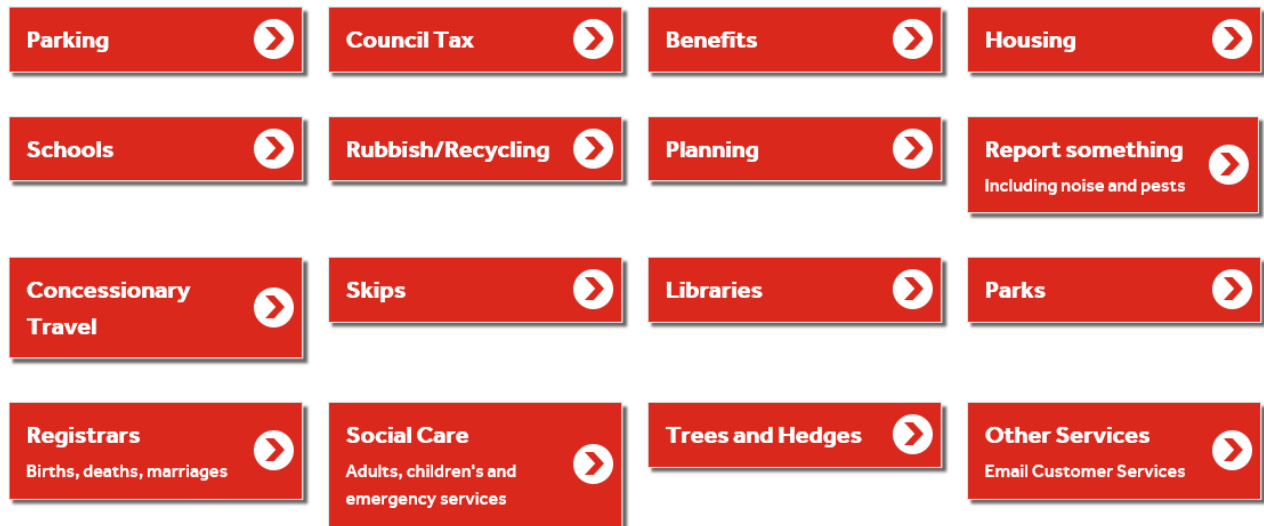
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- [Out of Hours Emergencies](#)
- [Councilors and MPs](#)
- [Jobs in the Council](#)

After:

What would you like to contact us about?



So far the changes to these online pages have resulted in 26% less emails being received in customer services due to customers being able to find the information they require more easily and/or being able to contact the right officer without having to go through customer services first.

Before these changes were made 'User Acceptance Testing' was conducted for the Decision Trees in Wood Green Service Centre with F2F customers. Feedback included:

"Is related to what I'm looking for. Clear and understandable"

"Parking option is clear to me and I know it's relevant to my query"

"The big button works for me because it's clear and direct"

"Big red buttons works well"

In addition it was found that 89% of respondents had a smart phone and 88% of respondents used the internet daily. This dispels the myth that most service centre users go in because they don't have internet access.

2. Changes to the telephone system

- From 29 August, the council's switchboard became an automated service. Calls to the 020 8489 0000 number will no longer need to be transferred manually.
- The new automated switchboard and Customer Service IVR telephony system, provides an efficient, easy route for residents, businesses, visitors and customers to contact the right service first time during office and out of hours.

- Research conducted showed that it previously took two members of staff to handle switchboard calls daily and identified that 96.6% of these calls could be automated, hence an immediate cost saving.
- The new Council's telephony system has 4 simple options, which diverts calls to the relevant service with additional features such as the option to request a queue call back or free SMS to web links.
- On day 1 of the new telephony system, Customer Services received 200 less calls. 200 calls that were dealt with through other channels including web and text SMS.
- This call reduction is equivalent to 4 fte of effort.

3. Changes to letters being sent out – Revenues & Benefits and Housing Rent letters

Homes for Haringey Rent letters:

- Rent letters were generating avoidable contacts from residents because they couldn't understand the content e.g. where a minus symbol appeared beside the 'rent balance' (as used in accounting terms) customers interpreted that as a debt, rather than as a credit.
- Through the Programme, in collaboration with Services, these letters were amended to simplify the language, remove unnecessary content and replaced the minus symbol with the word 'credit'
- Rent letter changes are complete and the progress is being tracked - May saw a reduction in contacts of 36% (962 fewer calls)

Revenues & Benefits letters:

- There was a review of a range of letters and notices sent to customers that were generating a lot of customer contact. These letters were re-written and the respective web pages for these communications were also updated. The purpose was to ensure customers understood the information being requested and what was required from them.
- Numerous Benefit letters requesting information to support Benefit claims and Revenues recovery notices were re-written to make them easier to understand.
- The objective was to reduce the unnecessary customer contact received as a result of these letters by 10%. This would only be achieved if customers understood what was required of them. A 10% reduction would achieve a saving of £77,345 (2.1 FTE) for Benefits and
- £24,750 (0.67 FTE) for Revenues from the reduction in volume of work.
- The changes were made in April and Benefits has seen an 11% decrease in contact since the introduction and a 23% reduction compared to the same period last year.

- Revenues has seen a 23% decrease in contact since the changes and 20% reduction compared to the same period last year.
- The customer experience is greatly improved as they no longer have a need to contact the Council for explanations or further information. Feedback from customers on the web pages has also been very positive. These now contain answers to all the questions they may have but is also presented in a very clear and easy to find way.
- For staff, not having those extra 830 queries a month for Benefits and 530 a month for Revenues means resources can be utilised elsewhere. It also means work is being processed quicker as the service gets the information required straight away – A quick turnaround time is also great for the customer.
- Going forward a programme of continuous improvement is being put in place for Revenues & Benefits to continue the good work. Staff are being equipped with the skills to run their own workshops to help them review and improve their communications on a regular basis.

4. Landlords Portal

- The Landlord portal, (software provided by Northgate) enables landlords to self-serve, whether that is to obtain information or send in information.
- The Portal went Live on 22nd August and have issued just under 800 personal invites to landlords to register for the service.
- Housing Associations and landlords with an excess of 50 tenants have already been set up on the Portal. The aim is to have the portal as the first point of contact for over 90% of all landlords by December 2019.
- The landlords can view for themselves all the information and data they would previously contact Customer Services for or emailed the back office for. Plus, this information is available to them in real time 24/7. They can also download letters and payment schedules, they can send communications straight to the back office, including attachments or proofs. Going forward, this should be the only method of contact most of our landlords will require.
- The benefits for staff is only receiving contact that is necessary and receiving that contact in a structured way that makes it quicker to process. Reducing landlord contact into the back office by 15% will give us a £6,675 (0.18 FTE) saving
- Initial feedback from the Housing Associations that tested the portal was all positive. They found it easy to use, and confirmed it gave them access to all the information they needed. They have also been our greatest advocates in promoting the portal to other Housing Associations.

5. Travel bookings

- Internal processes have also been assessed to improve the staff experience when requiring support from the back office. One such case has been the travel booking process.
- A small working group was set up to review the current travel booking process which appeared to be very slow, unclear and resulted in a large amount of manual handling.
- The working group which included a range of officers both as customers of this process and receivers of it, worked together to design a new eForm that was both user friendly and reduced the effort required to make the request.
- This initiative has resulted in a saving of approximately £60,000 (1.5fte) within the Business Support service as well as increasing the scrutiny and compliance of travel spend for Council Services
- This process has been Live since July 2019 and initial feedback from staff completing the form is positive. Business Support officers receiving forms state that the eForm ensures that mandatory fields are complete which avoids the need to chase information.
- Staff using the form have also provided positive feedback:
“Having a new eForm with drop-down options is much easier and takes me less time to complete”

Appendix 2: Residents Equality Impact Assessment

Equality Impact Assessment Screening Tool				
1	Lead officer contact details: Elaine Prado			
2	Date: 22.08.19			
3	Summary of the proposal: FOBO Programme – effect on residents			
	Response to Screening Questions	Yes	No	Please explain your answer.
a) Type of proposal				
4.	Is this a new proposal or a significant change to a policy or service, including commissioned service?		N	While automation is being introduced to a range of front and back office services, there is no proposal to remove any of the current service offers
5.	Does the proposal remove, reduce or alter a service or policy?		N	The service offer will be enhanced by the addition of automation to already existing online services to increase the speed of delivery
6.	Will there be a restructure or significant changes in staffing arrangements? Please see the restructure pages for guidance for restructure EqlAs .	Y		There will be a separate EqlA for the workforce
7.	If the service or policy is not changing, have there been any known equality issues or concerns with current provision. For example, cases of discrimination or failure to tackle inequalities in outcomes in the past?		N	The improvement to the online offer has been requested by residents wanting to do more online, in their own time. This will not negatively affect residents accessing services via more traditional methods (i.e. telephone or in person)
b) Known inequalities				
8.	Could the proposal disproportionately impact on any particular communities, disadvantaged or vulnerable residents?		N	As stated above, automation is being introduced to a range of front and back office services, however there is no proposal to remove any of the current service offers
9.	Is the service targeted towards particular disadvantaged or vulnerable residents? <i>This can be a service</i>		N	

	<i>specifically for a group, such as services for people with Learning Disabilities. It can also be a universal service but has specific measures to tackle inequalities, such as encouraging men to take up substance misuse services.</i>			
10.	Are there any known inequalities? For example, particular groups are not currently accessing services that they need or are more likely to suffer inequalities in outcomes, such as health outcomes.		N	
11	If you have answered yes to at least one question in both sections a) and b), Please complete an EqlA.			<p>If a decision is taken not to proceed with a full EqlA, please document carefully your reasons here:</p> <ul style="list-style-type: none"> • The proposal is likely to have no impact on groups that share the protected characteristics or other disadvantaged groups • We anticipate the proposal to have a positive impact on the service received by service users including residents and visitors to the borough • Should the screening responses change in the future with new proposals, a new screening tool will be completed that may require a full EqlA to be carried out.

Appendix 3: FOBO Stage 1 Roadmap

FOBO Stage 1

	<div>Front Office</div> <div>Back Office</div> <div>Both Front & Office</div> <div>External Comms</div>									
	Feb 19	Mar 19	Apr 19	May 19	Jun 19	Jul 19	Aug 19	Sep 19	Oct 19	Stage 2
Revenues & Benefits	Capture of email addresses ✓	Process automation supplier on site ✓	Transfer of Agency staff to Meritec ✓	Document bundling ✓ Outbound communications agile sprint ✓	Email to advise landlords ✓ Revs/Bens letters updated ✓	Deliver printing efficiencies ✓ New Landlord Portal ✓ Improvements to outbound communication ✓	Improvements to inbound communication ✓ Haringey website ✓	Improved customer service scripts ✓		R&B process automation completion New document mgt system E-billing Improved customer service scripts
FIG & Business Support			Travel booking agile sprint ✓	Stop printing panel papers ✓ Emails to advise stakeholders ✓	Complaints webpage updates ✓ Stop printing various requests ✓	Automate clinical waste ✓ Automate travel bookings ✓				New complaints logging system Improve the complaints process
HR & Finance		Purchase card agile sprint ✓	New DBS charging model ✓ Vfire staff portal sprint ✓	Transcribing service changes ✓	Purchase card road shows ✓	HR intranet pages agile sprint ✓		Identify improved debt mgt process ✓	Centralised shopping trial completed Internal poster campaign	New HR mgt system Upgrade staff portal
Digital Customer	Queue call back ✓	Queue call back reporting ✓ Digital platform requirements sprint ✓		New contact us online pages ✓ Webchat proof of concept ✓	Wrap up codes ✓	Haringey people ✓	New online content mgt - customer ✓ New switchboard approach ✓	Home to school online measuring service ✓ New IVR ✓		New online/email mgt - reporting SSC automation
Housing & Parking				Rent explanation letter ✓ Update website ✓					Update parking webpages and application forms Simplify online skips license	Improve My Estates mobile App
People, change & shared practices	FOBO intranet and Yammer page ✓	OLA for planning & CS ✓ Change champions recruited ✓	Costed as is and to be structures ✓	Consultation Planning and Documentation ✓	Launch Consultation ✓	EQiA for residents ✓	Final structures approved ✓	FOBO Stage 2 Planning ✓	EQiA for the workforce	Project Closure