

	<h2>Policy and Resources Committee</h2> <h3>16 December 2015</h3>
<p style="text-align: right;">Title</p>	<p>Customer Access Strategy</p>
<p style="text-align: right;">Report of</p>	<p>Director of Strategy</p>
<p style="text-align: right;">Wards</p>	<p>All</p>
<p style="text-align: right;">Status</p>	<p>Public</p>
<p style="text-align: right;">Urgent</p>	<p>No</p>
<p style="text-align: right;">Key</p>	<p>Yes</p>
<p style="text-align: right;">Enclosures</p>	<p>Appendix 1 – The Draft Customer Access Strategy Appendix 2 – Equality Impact Assessment</p>
<p style="text-align: right;">Officer Contact Details</p>	<p>Kari Manovitch, Head of Customer Strategy & Programmes Bill Murphy, Customer Services Director, CSG, 07847188983</p>

Summary

Increasingly, people are embracing new communications technologies and using them in their everyday lives. We see it in the way we now manage our finances, book our holidays or do our Christmas shopping – all of which can be done at a time that suits us, in a way which is quick and convenient and which, in the vast majority of cases, delivers what we want. The Council’s vision, through the Customer Access Strategy, is to achieve a public sector version of this, which allows our customers to engage with us in ways which are simpler, more convenient and more in keeping with modern life.

Over 82% of Barnet residents have and use the internet for online transactions for many aspects of their lives as they can do this in the comfort of their own home at a time which is convenient to them. However, in terms of how residents contact the Council, around 80% is still conducted via the phone.

In achieving our vision, we will gradually seek to shift this figure, by 2020, to 80% of customer transactions being done online or other ‘digital’ means, by working to ensure that the contact methods the Council provides are easy to use and intuitive. This is how most Barnet residents prefer to access services; it will provide residents with a better experience and save the Council money so it can direct resources to support those most in need.

To achieve this, the strategy proposes changes to the way customer services are currently delivered, while also ensuring that customers who experience barriers to accessing services via self-service channels are supported to do so.

Whilst the Council's vision is to make it as easy as possible for people to access services digitally, some residents will still require face to face advice for services such as homelessness and housing need. The strategy proposes changes to how face-to-face services are delivered, making best use of new or existing community assets such as libraries and community hubs, as well as the Council's new headquarters at Colindale. The approach supports the Council's vision that, by 2020, local services will be more joined up, with public sector agencies - such as the Council, NHS, Jobcentre, police and health and education advisers - embracing co-location and taking a more integrated approach by pooling resources, sharing staff and assets and developing joint solutions. This builds on the success achieved by the multi-agency Welfare Reform Task Force and Burnt Oak Opportunity Support Team (BOOST), which are multi-agency teams that provide integrated support in one location, generating savings for the public sector and better services for residents.

Finally, the Customer Access Strategy also recommends that Barnet's contact centres should all use the same technology and adhere to the same customer care standards, and that we bring more customer data together into a single reporting tool. In addition, the strategy proposes that the Council develops a clear approach to the management of social media as a customer services channel; that we explore the development of 'apps' for mobile internet devices in addition to website access for high volume services; and that we plan for how customer services can support the Council's demand management strategies, through encouraging greater use of community resources.

Recommendations

That the committee

- 1. approves the draft Customer Access Strategy in Appendix 1 of this report.**
- 2. agrees for the proposals in the Customer Access strategy that will alter the way customers currently access services to be consulted on with the public for a period of 8 weeks, starting no later than 18 January 2016.**
- 3. approves the funding for the first phase of work as outlined in section 5.2 of this report.**
- 4. receives a report back in 2016, with the outcomes from the consultation, and a progress update on the development of a full business case for implementing the Customer Access Strategy.**

1. WHY THIS REPORT IS NEEDED

- 1.1. Barnet's vision for 2020, as set out in the Corporate Plan, is to provide local services that are integrated, intuitive and efficient, making life simpler for our residents and customers. New technologies are an important part of this. Most of us are used to the benefits that new technologies have brought to our everyday lives – how we now shop, travel and communicate. As customer services across the private sector continue to innovate – particularly in the retail and banking sectors – this creates higher expectations about what residents expect of the public sector. The Council's vision is to create a public sector version of the online experience that residents receive from leading retailers and banks.
- 1.2. The Council has made progress and has already responded to the changing habits of our residents by providing more information and services online and via automated telephony. It is now much easier to interact with us – to report a problem; to pay a bill; to see how taxpayer resources are spent; and to participate in a consultation. This makes people's lives easier and saves the Council money by reducing pressure on staff resources. However, we know there is more work to be done to respond to increasing public expectations.
- 1.3. The Council's vision for customer services in 2020 is:
 - That the majority of access is via digital means – 'digital by default'
 - Customer journeys enable efficient and effective resolution at the earliest opportunity
 - Customers receive a high quality personalised service, including relevant services from partners
 - Customers are connected to the community, not just Council services
- 1.4. This vision reflects what our data tells us that customers expect from public services, and the factors that drive positive customer satisfaction, as well as the Council's core principle of responsibility, with residents taking on more personal and community responsibility for keeping Barnet a great place.
- 1.5. The Customer Access Strategy sets out how we will achieve this vision for customer services. It uses a range of data including customer demographic data, customer feedback data, transaction volume data and national trends, and looks across all Council services to identify areas to improve the experience for customers and generate efficiencies. The strategy has been written with the full involvement of the Council's Delivery Units and Commissioning Directors.
- 1.6. The implementation of this strategy will take place over a number of years, and investment will be phased and subject to approved business cases. The focus at this stage is to make the case for change, so that we can then consult the public on those changes that will affect their access to services, and to start developing those proposals in more details to understand the precise costs and benefits.

- 1.7. As detailed changes are developed over the next 2-3 years, there will be a need for further customer engagement to ensure that the proposed improvements meet customer need. The strategy also acknowledges that the Council has a set of service design principles formulated with several groups of residents during the development of My Account, which describe the features of an excellent customer experience. These design principles will be applied as part of any service redesign activity undertaken as part of the implementation of this strategy.
- 1.8. We know from our customer data that 82% of Barnet residents have access to, and are competent in using the internet to access information and perform transactions. While in some areas significant progress has been made – for example, 98% of schools applications are made online – telephone contact still comprises around 80% of contact with Council services, with staff answering queries and recording and submitting customer requests.
- 1.9. The majority of Barnet residents choose online transactions as the most convenient way to transact for a range of retail and banking services, with 50% classed as highly sophisticated users of technology. Yet the Council still has relatively poor take up of its own online services, compared to the use of the phone. The aim of the strategy is to ensure, where possible, that residents can transact online as easily with the Council, as they would with Amazon. This requires further investment, and the strategy identifies the priorities for this investment.
- 1.10. Another important benefit of improving and increasing facilities for online and telephony self-service is that it will free up more time for customer services staff to focus on those customers with complex needs such as customers with accessibility issues or who are in vulnerable situations. These customers often need a greater level of advocacy or assistance and it is important that a human, empathetic approach is maintained.
- 1.11. Customer services is an area where often inefficient processes lead to both poor customer experience, and unnecessary cost. The interviews and workshops with Delivery Units highlighted that the fact that often systems are not fully integrated and we do not have technology fully supporting our processes. This leads to inefficiency, and a risk that the communication of customer requests, and the outcomes for those requests get broken at some point during the process. There is still too much reliance on manual activities by staff and retyping information, which is inefficient. We are also lacking automated progress reports to customers, which results in customers having to chase us to get an update rather than us keeping them better informed. The research also identified that for some services, such as Planning and Adults & Communities, a significant proportion of phone calls are from customers seeking information that is already online, or could be published online. Making this easy for residents saves them time, and delivers further efficiency savings.
- 1.12. The strategy therefore concludes that while some improvements and savings can be made from increasing self-service and reducing telephone calls and face to face visits, and making the initial customer experience better for customers, much bigger savings and customer experience improvements will

result from a combination of demand reduction and process improvement, making end-to-end journeys as automated or 'digital' as possible. There is a project already underway by Street Scene to automate the process from customer contact to full resolution for street-based services and green spaces, which will deliver a significant saving in addition to the improvement to the customer experience.

1.13. The initial modelling shows that there is a business case for investing in making services more digital, but more work will be done to establish the precise costs and benefits.

1.14. The Customer Access Strategy identifies what needs to happen to translate the vision for customer access into reality and concludes with the following recommendations:

- **Website information provision** - It still appears to be easier to find a phone number and phone the Council, than it is for customers to find the answers they need on the Council's website. For example, amongst all the phone calls received by Social Care Direct, the customer service team for adult social care, 60% are resolved straightaway. This means that the majority of these phone calls will simply be seeking information or advice, and much of this information either is already, or could be, published online. At around 4,000 calls per month, this is costing around £10,000 per month. ***Information about Council services still needs to be much easier to find and accessible to more people. A review of the existing website is required as well consideration given of other ways of providing the information such as apps for mobile devices such as tablets and smartphones, and proactive delivery of information via email in response to customers' own search criteria.***
- **Website functionality** – while good progress has been made with the new website and My Account, there is still some missing functionality. **The following integrated functionality needs to be prioritised in the IT investment roadmap** as it is not possible to deliver modern, efficient customer services that promote self-service until this functionality is in place:
 - An online bookings/appointments tool for accessing all those services that offer appointments or public facilities
 - A corporate payments solution, so that there is one consistent, integrated and user-friendly tool for all services payments to be made online
 - An online geographic mapping tool that can be integrated with service systems so that location-based services and service requests and other data can be easily presented on interactive, searchable maps, using common standards for geographic data
 - An improved tool for managing webforms and the full end-to-end process through to the resolution of the customer request, which would provide customers with electronic alerts regarding status updates and notification of job completion

- Improved online directories of services and organisations that support the Council's community participation and demand management objectives
 - Integration of the Barnet Homes online services with the existing My Account facility on the main Council website, enabling customers to view and interact with multiple services in one secure place.
- **Piloting self-service only services** – with 82% of Barnet residents able to transact 'digitally', we know that there is scope to make some services 'digital-only', as with Universal Credit. Self-service would then become the default way to access them. It is recommended that once we have implemented improvements to make it easier for customers to self-serve, and ensured that the end-to-end customer experience is efficient and effective, that a set of services are tested as pilots for 'self-service only' services. This would mean that personal support from customer services staff over the phone or in face to face locations would be focussed on helping customers to self-serve, or helping those customers who are unable to self-serve, or who have a complex case. It should be noted that self-service may include automated telephony solutions where these best meet the needs of customers and are possible for the service in question; the Council already has a number of automated telephony services in place. The pilots proposed below have been developed in consultation with the Delivery Units and Commissioning Directors and reflect high volume transactions that should be straightforward, where customer services staff intervention can usually add little value:
 - Reporting highways and street related issues
 - License applications for businesses
 - Parking¹
 - New bins and waste collections
 - Pitch bookings
 - Library Membership
 - School admissions (excluding in-year transfers)
 - Schools information
 - **Digital Inclusion** – this is the term used nationally to refer to people who have the ability and the means to use digital technologies that rely on internet access. Our data, and national data, says that 82% of Barnet residents are willing and able to use digital channels, but we recognise that the 18% that are not 'digitally included' are likely to be the key users of our services. We also know that within the 18% there are people who have computer and smartphone and internet access but choose not to use them to access Council services, where additional support from the Council or community organisations could make a difference. We also

¹ This service has gone a long way towards 'digital by default' already, and any further development will adhere to national guidance that there should be provision to allow a process of oral PCN representations to be made to the Council where the vehicle keeper would struggle to communicate in writing by reason of his/her disability.

know that there are ways of making digital services more accessible through various assistive technologies and intelligent design. For other customers who will never be able to use self-service tools we need to ensure we have special arrangements that enable their access to services, so that people who need our support will always get it. ***A Digital inclusion strategy needs to be prepared in advance of any decisions to make any service 'self-service only', to develop a better understanding of those who are digitally excluded, and identify how this group will be supported to use council services, and include using learning from other authorities.***

- **Telephone Contact Centres** – currently the Council has a number of telephone contact centres:
 - **Customer Services main provision** – 75% of all contact centre calls, based in Coventry, managed by the Customer & Support Group (CSG);
 - **Social Care Direct** – first line support for enquiries related to adult social care, based at Barnet House, managed by CSG
 - **Re service hub** – based at Barnet House, managed by Re
 - **Barnet Homes** – two separate telephone contact centres: one for tenants and leaseholder services, and the other for housing options
 - **Electoral registration** – a specialist service run by CSG for elections, with in-year contact handled by staff in the Assurance Delivery Unit;

There are also over 1 million calls are also made annually to Council desk phones, a portion of which represent external customer contact.

- Given that diversity of access can create diversity of standards, and given the need for savings, the strategy proposes that the starting point is that where this can be proven to be the most cost effective option, and can deliver the required service quality, ***all Barnet calls should use the same technology, customer care standards, and potentially, the same contractual arrangements. Therefore, there needs to be a review of all remaining Barnet based call centres to assess future options.***
- **Re-designing customer journeys end-to-end** – We know from our data and research that fulfilling a customer's request is what matters most to customers and their satisfaction levels. Therefore, if we were only to look at the contact methods and access points, we would not deliver the level of improvement required to achieve the Council's vision. The full end-to-end customer journeys need to be reviewed to make sure that information is transferred accurately and efficiently from the customer to the teams that deliver the final outcome, who in most cases are not part of customer services.

It is proposed that the key customer journeys are identified and subjected to detailed review and re-design. We believe that these reviews will be

needed before we can pilot any services as 'self-service only'. Following data analysis and discussions with Delivery Units, **it is recommended that this work begins with the following four services**, prioritised using a number of criteria – known issues with end-to-end service impacting satisfaction, the potential for savings, and the potential for reducing telephone and face to face visits in favour of self-service:

- Street Scene service requests, building on the existing project underway
- Adult social care – self assessment and information
- Creation of a business portal – single point of contact for Council services for businesses (e.g. Business rates, Trade waste). This is also recommended for our first 'App' pilot (see recommendation below).
- Housing services (homelessness, housing options, and tenant and leaseholder services)

These reviews will help us learn how best to approach subsequent service reviews, and what the costs and benefits of redesigning the customer journeys and IT requirements are. The IT strategy has a workstream to develop integration of systems and data sharing. The detailed requirements for this need to be informed by requirements of this strategy.

The end to end journey mapping needs to consider:

- How do customers currently experience these journeys?
- Will systems integration reduce cost and improve the service?
- How do we keep customers updated for service processes that can take a long time to resolve?
- Where does the web add value within the customer journey? Would adding the service into MyAccount add value?
- How could full online access to customer records & integration to case management systems (e.g. Council tax and benefits, the new Mosaic system in adult social care) add value?
- Can more work be brought into the front office? Can work flowing direct to professionals or operatives via systems and handheld devices reduce the need for middle/back offices, as being developed for Street Scene?
- Could more calls be put into the main customer services contact centre?
- Can social media assist the service delivery process?
- Are there opportunities for other technology to improve service and efficiency (e.g. identification tags on street furniture, automatic laser scanning of roads to identify potholes attached to buses and Council vehicles?)
- How is customer feedback and co-design integrated into the service chain?
- Where can community-based providers offer greater support to residents and users?
- Could community hubs be used to support multi-agency working?

- What opportunities are there to reduce the availability of staff once the self-service offer and digital inclusion approach is good enough?

The strategy identifies that 5% of residents make up 20% of the calls to the Council. Understanding and engaging with this group will be a priority in terms of ensuring that any service redesign has the desired impacts.

- **Customer and Business Intelligence (BI).** Information about customers that is not held by CSG is still difficult to access. The Council's data warehouse solution, used for customer data analysis, does not have a full 'single view of the customer'. Without this oversight, the Council cannot fully or efficiently understand how its customers are experiencing services, or where there are opportunities for improvements. ***The Council needs to ensure that high volume customer data is available across all services and all DUs need to make their customer data available to the data warehouse to give a total overview of the customer experience for Barnet residents.***
- **Social Media** – the Council has two active Twitter accounts, one main one, and one for the libraries service. There is also a Council Facebook page, and a Barnet Libraries Facebook page, and a less active page for young people regarding employment and training ('BEETS'). Customers increasingly use the main Council accounts to report problems related to Council services – with on average two reports via this channel each day. CSG Customer services is in the process of taking on responsibility from the corporate communications team for responding to those social media contacts that raise customer service issues, with responses directing customers to use the existing access channels, particularly the Council's website, unless the issue concerns a technical problem with those channels. The Council is not proposing to create a dedicated customer services Twitter or Facebook account at this stage, due to the low volume of customer service messages, but this will be kept under review. The Council will instead focus its resources on ensuring that the Council's website is easy to use and delivers a quick, responsive service. ***The customer journey mapping projects will consider the role social media might play in improving the customer experience for the individual services being reviewed.***
- **Apps** – The strategy contains data on the huge increase in the use of mobile devices such as smartphones, which use 'apps' to access services. The strategy proposes that the Council develops an app to evaluate whether it improves customer satisfaction and increase self-service when compared to website self-service, and whether the cost is lower. The app would need to provide access to a service with a degree of complexity in order for it to be a useful pilot for testing a broader approach. ***Given the Council's aim to encourage an 'entrepreneurial Barnet' and the desire to make Council services for businesses more joined up and easier to access, it is proposed that a business app be the first pilot. This will be the goal of one of the four proposed end-to-end service reviews.***

- **Demand management and community participation** – The strategy primarily focuses on customer access to Council services, but in parallel the community participation programme, overseen by the Community Leadership Committee, is working to establish a stronger role for the community in delivering services and supporting residents. ***Commissioning Directors to identify, with their theme committees, how they wish customer services to promote more community participation and the use of community providers for the services they commission.***

1.15. The future of Council face-to-face Services

The Council's vision, as articulated in the Corporate Plan, is that, by 2020, the public sector will become more integrated in its approach to service provision, by co-locating in areas of need; pooling resources; sharing staff and assets; and developing joint solutions to manage demand and provide quality services. By 2020, the objective is that Barnet's public services will be commissioned jointly for the borough by the Council working in partnership with the NHS, Jobcentre, police, education providers and other local partners, and that those services which require face to face contact will be co-located in areas where there is need.

For residents, this approach will mean easier access to the services without having to deal separately with different agencies and, for the Council, it will reduce bureaucracy and generate efficiencies, with increased collaboration driving improvements in the way services are designed and delivered. The Council has already worked effectively to co-locate with other agencies in a 'hub' model in a number of areas, including:

Barnet Welfare Reform Task Force

- The Task Force, created in 2013, brings together Council housing advisers, Jobcentre Plus staff and mental health advisers into a co-located single team – based at Barnet House – to work with those impacted by Welfare Reform.
- The 'one-stop shop' approach has proved to be more effective than any single agency at engaging with residents because the different partners are able to reinforce each other's messages. Where one agency is unable to engage a particular resident, another might have more success. Depending on their personal circumstances, some residents have been more receptive to messages delivered by their local housing officer, a Jobcentre Plus adviser, or a Housing Benefit officer.
- The results have surpassed what the Council originally expected, with the Task Force successfully engaging with 96 per cent of Barnet residents affected by the Benefit Cap and helping more than a third (35 per cent) into work.
- This approach has also paid dividends to the Council and its local partners, with economic analysis showing that assisting over a third of residents affected by the Benefit Cap into employment returns savings of

three times the money invested in getting them there.

Burnt Oak Opportunity Support Team (BOOST)

- The experience of the Welfare Reform Task Force told us that people's needs do not fit neatly within public service boundaries. Residents are often unaware of, or confused by, the breadth of support available to them, and they grow weary of providing the same information to multiple agencies.
- By creating a place-based 'Jobs Team' in Burnt Oak (BOOST) - which brings together the 'Love Burnt Oak' community group, Jobcentre Plus, Benefits service, Youth services, Barnet Homes and Health Coaching Support from Future Path - it was envisaged that all the partners would work as a unified service for the benefit of the local community.
- The team provides face-to-face advice and well as contact over the telephone and through the use of social media. It was designed to be a model for the future, with coordinated local services delivered in areas of the greatest need using less resource.
- BOOST is based in Burnt Oak Customer Services Centre and the space is not owned by the Jobs Team or seen as the Jobs Team's office. It is a shared community space with an informal feel - training and outreach activities make use of other community settings such as the Burnt Oak Resource Centre and Barnfield Children's Centre.
- Since the service went live in May 2015, a total of 225 people have signed up for support and 75 have found employment.

These case studies demonstrate that the provision of face-to-face services through a model which brings together a number of related services into an integrated, co-located community hub can provide benefits for those that use the services on offer, as well as the Council. It is very much this approach that is being used to inform how Barnet's face-to-face services will be designed and operate moving forward.

- 1.16. In Barnet, there are currently two face to face centres with a footfall of c.125,000 annually, with around 45% of visits to Burnt Oak Customer Services Centre and 55% to Barnet House. Most of these visits are for housing benefits and Barnet Homes services, as Table 1 below shows. Whilst there will remain a need for face to face contact for those at risk of homelessness, and family services clients, and for universal credit claimants over the age of 65, there is scope to reduce the need for the remainder of visits. The introduction of universal credit as a web-only service for working age claimants has established a precedent with regard to moving benefits claiming online.
- 1.17. In November 2015 Customer Services successfully introduced a new approach to managing the face to face visits received relating housing benefits, Council tax, and general enquiries, offering a combination of assisted self-service and freephones to obtain advice from the contact centre or book an appointment on

another day. This means that we have ceased to offer a 'walk in' service in the Council's face to face centres, except for rare emergencies. Barnet Homes is also exploring whether it can reduce the walk-in element of its tenant reception service at Barnet House. These changes are consistent with how customers expect to access services, as they give customers certainty over when and where they will obtain the advice they need, they reduce the queue times, and reduce the overall footfall because customers realise that they can more quickly obtain the information or advice or appointment that they require by using the telephone, email or the website options.

- 1.18. This model of obtaining advice via scheduled appointments rather than 'walk-in' is intended to become the main operational model for non-emergency face-to-face visits.
- 1.19. Services that currently require customers to physically present documentation for proof of eligibility and entitlement will be asked whether this can be done remotely either electronically or by post, and making the required process changes will be incorporated into the proposed face to face project.
- 1.20. The Council's Assets and Regeneration Committee agreed that as part of the Council's accommodation strategy, the Council would initiate a new build development at Colindale, with a view to breaking the lease at Barnet House or sub-letting from October 2017.
- 1.21. There is no current plan to close the Burnt Oak Customer Services Centre. Thus the Council has a choice about what should happen to the face to face customer contact that currently happens at Barnet House. To risk assess the impact, a review was undertaken to ensure that there would be sufficient provision to meet customer face to face demand following its closure. Through analysing the customer data and understanding the plans for the various services and Council buildings, Table 1 below sets out where the demand would be met. At this stage, this shows that the demand can be accommodated within the other Council buildings that are available. However, as plans for community hubs and multi-agency working develop, these new sites can be considered for certain services. All these proposals need further investigation and detailed design, and will be informed by consultation with the public, which will commence following the Strategy's approval by this Committee.
- 1.22. The detailed proposals around the use of libraries for housing benefits/council tax services, document provision and assisted self-service, will be developed early in the new year and will need to recognise the implications of the libraries strategy which is currently out to consultation. The funding implications will be considered as part of the development of the business case for the proposed face-to-face changes.

Table 1

Service	Avg Barnet House visitors	Nature of current visits	Proposed changes
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	a day		
Housing Benefits & Council Tax	150	Appointments and mandatory document provision/certification. Walk ins being reduced.	Assisted self-service, document certification and appointments to be relocated to North Finchley and/or Golders Green libraries. This would promote additional footfall to these libraries, and utilise existing community assets that are geographically close to where the existing customers live.
Housing options and homelessness	50	Appointments and walk ins	Relocate appointments to the ground floor of the new Colindale Headquarters or a community hub in the west of the borough. This is a more accessible location for the majority of the client group. The venue / location for receiving 'walk in' demand is still to be determined, and the proposed end to end review of this service, and review of face to face, will look at how 'walk ins' can be reduced, as well as how web-based information and services can be improved.
Housing tenants and leaseholders	30	Appointments and walk ins	This is not a well-used service and Barnet Homes are looking at how improved web self-service as well as the existing telephone contact centre can meet customer needs without the need for a face to face reception.
Planning Office	25	Appointments and walk ins	Relocate appointments to the normal officer meeting rooms within the new Colindale Headquarters, and cease to offer walk ins. The need for walks ins is already reducing due to better availability of online documents.
Registrars (Birth and Death Certificates)	20	Appointments only	Relocate appointments either to Barnet Hospital or identify a better location for the service once a decision is made on the future of the existing office in Burnt Oak.
Welfare Reform Task Force	18	Appointments only	Re-location to follow the location of housing advice services offered by Barnet Homes.
Family Services (child protection interviews and	7	Appointments only	Relocate appointments to the ground floor of the new Colindale Headquarters or community hub as determined by the

conferences, youth offending meetings)			new operation model for the service.
Booked meetings	Unknown	Customer invited in for specific services e.g. SEN reviews	There are a number of meeting rooms that are booked by services for specific functions as and when needed. This will be captured by the Colindale Headquarters project

Table 2

Council building	Proposed primary use
Burnt Oak Library & Customer Services Centre	The customer services provision will stay as it currently is, which is general information, advice, appointments, and document certification and receipt for Council services, predominantly housing benefits. However the footfall will be reduced through service re-design and increased use of the improved website and self-service facilities by customers. The multi-agency jobs team (BOOST) will remain in place. Subject to the proposed face-to-face and service reviews, and space analysis, from 2017 it may also include housing advice and homelessness and the welfare reform task group.
Golders Green and North Finchley Libraries	Assisted self-service for accessing all services available online, with particular emphasis on housing benefits and Council tax support; receipt and certification of customer documents used to prove eligibility and entitlement, with specialist scanning facilities; provision for appointments regarding housing benefits and Council tax.
The new Colindale headquarters	Appointment-based customer visits only. The exact mix of services will be subject to service design. Current proposals considered are for family services (child protection, youth offending), housing options and homelessness, housing tenants and leaseholders, and other statutory referral-based services.
Colindale Barnet Centre for Independent Living & Library	This new building may also be a site for those services that offer advice on a walk-in basis, such as those offered by Barnet Homes.
Community Hubs (various locations)	These are at an early stage, but a number of services are developing commissioning plans that involve the use of community hubs where this provides a more appropriate form of delivery. These will comprise a combination of third sector provision, partnership-based services (e.g. a multi-agency jobs team such as BOOST) and Council services that offer advice on a walk-in basis.

The next stage is to consult with the public, and develop a full business case for the changes outlined above to ensure that the investment will deliver the expected benefits outlined in the strategy.

2. REASONS FOR RECOMMENDATIONS

- 2.1 The strategy is needed to achieve the Council's vision for customer services in 2020. Investment will also enable the release of savings that contribute to the Council's overall savings requirements.

3. ALTERNATIVE OPTIONS CONSIDERED AND NOT RECOMMENDED

- 3.1 The Council could choose to not produce a Customer Access Strategy or invest in improvements. This was rejected because this would not enable the Council to achieve the vision or meet its savings target of £500K by 2018.
- 3.2 Rather than looking across all Delivery Units and having a Council wide strategy, it could have been left to each DU develop its own approach. However this was rejected on the basis that it would lead to an inconsistent approach to customer service depending on which service you were accessing as well as being wasteful in terms of duplicating IT costs when shared IT would be more cost effective.
- 3.3 In terms of the Council's proposed changes to face-to-face access to services, doing nothing is not an option because Barnet House will not be available from 2017. In addition, savings are required from the review of face-to-face services to meet the needs of the Medium Term Financial Strategy, so replicating Barnet House's customer services model in a new location, thus preserving two customer services centres in the borough, would not enable the Council to make savings. Having a single face-to-face centre at Colindale was considered. This was rejected for two reasons. Firstly there is simply not enough space to accommodate all customer-facing services into the new Colindale ground floor space, and secondly, the library strategy retains a facility at Burnt Oak. Therefore there is no business case to relocate the existing facility from Burnt Oak to Colindale. Similarly there is insufficient space at Burnt Oak for it to become the sole site of customer access in the borough, and it would be a less accessible venue for customers who live in the east of the borough.

4. POST DECISION IMPLEMENTATION

- 4.1 There will be an 8 week period of public consultation on the proposals within the Customer Access Strategy that will alter the way customers currently access services, followed with a report to Policy & Resources Committee in 2016.
- 4.2 The Council will commence work on **a number of the proposals in this strategy**, which will gather further evidence needed to understand the costs and benefits of implementing the Customer Access Strategy in full and develop the business case. An update on this will be reported to Policy & Resources Committee in 2016.

5. IMPLICATIONS OF DECISION

- 5.1 **Corporate Priorities and Performance**

5.1.1 Barnet's vision for 2020 in the corporate plan is to have redesigned local services that are integrated, intuitive and efficient, making life simpler for our residents and customers. This strategy outlines how this vision will be delivered with regard to customers' access to services.

5.2 **Resources (Finance & Value for Money, Procurement, Staffing, IT, Property, Sustainability)**

5.2.1 The delivery of all aspects of the strategy would require significant investment. It is clearly important to ensure that this investment delivers the full range of financial and non-financial benefits intended. Therefore a phased approach is proposed. Phase 1 of the work, the proof of concept phase, is designed to help obtain robust information that can inform a full business case. This will identify the investment needed to implement this strategy and the financial and non-financial benefits that it can produce. This will need to show that the investment will enable savings to be released at a timescale that supports the needs of the MTFs.

5.2.2 For phase 1 of the work, December 2015 to March 2016, a project team will work to deliver the first set of business cases to prove the key concepts within the Customer Access Strategy. The specific deliverables from this exercise will be:

- **Re-designing customer journeys end-to-end:**
 - A fully detailed and documented 'to be' customer journey for four initial services.
 - A business case for each service that properly quantifies the level of saving and/or increased income that can be delivered.
 - Full business requirements to enable ICT specialists to quantify the most appropriate technological building blocks and solutions
 - Indicative technical solutions and implementation plans.
- **A Digital Inclusion Strategy**
- **A detailed plan for face-to-face services post closure of Barnet House**
- **Review of the existing telephony contact centres**

5.2.3 The estimated cost of this will be £270k and will be funded from the transformation reserve.

5.2.4 A dedicated team will be based in Barnet for the duration of this work.

5.2.5 The IT infrastructure and platforms being recommended proposals will need to be benchmarked to ensure the Council is achieving value for money. It is anticipated that this will be achieved through engaging IT specialists in order to provide robust challenge. This is anticipated to cost £30k and be funded from the transformation reserve.

5.2.6 It is anticipated that the implementation of the business case will require

further investment. However, the scale and timescale of this will be dependent on the findings of the initial work, the subsequent full business case, and the outcomes from the public consultation. An update on these items will be reported to this Committee in 2016.

5.3 Social Value

5.3.1 The proposals outlined in this report seek to ensure that accessing the Council's services is a more efficient and effective experience, that services are more transparent and accountable to the customer, that more information and services are available online so that customers can access them at a time of their choosing, and that barriers preventing customers accessing online channels are addressed through a digital inclusion strategy.

5.4 Legal and Constitutional References

5.4.1 Constitution, Responsibility for Functions, Annex A, sets out the terms of reference of the Policy and Resources Committee including:

- To be responsible for the overall strategic direction of the Council including customer care, communications and resident engagement activities.

5.4.2 More detailed consultation on those proposals affecting customers will be conducted before the Customer Access Strategy is approved in final form; with sufficient information about the proposals and the reasons for them to allow stakeholders to make informed comments.

5.4.3 As firm proposals develop for each service change, there will need to be further consultation and service-specific equalities impact assessments to ensure that the final outcome does not prohibit residents with protected characteristics from accessing the Council's services.

5.5 Risk Management

5.5.1 The following risks to implementing this strategy have been considered.

Ref	Event	Root cause	Risk impact	Controls in place
1.	Public resistance to change in access methods	Public used to telephone and face-to-face as main channels and don't trust that online requests will be dealt with	Customer dissatisfaction, complaints Unable to deliver channel shift savings hence wasted investment	Customers involved in designing new digital channels and processes/journeys. Digital inclusion strategy to support those for whom "digital" is not the best approach. Phased piloting of changes Communicating changes to residents in advance
2.	Failure to	Solutions not designed	Savings forecast will	As projects go live contacts to be

	achieve the channel shift percentages required to allow the savings to be realised.	around user's needs. Poorly understood business requirements.	not be achieved.	monitored to ensure that channel shift benefits are being achieved.
3.	Skills and capacity to enable the required business change are not in place	We didn't plan the resources requirement adequately or early enough. We don't pay the requisite market rate to attract the skills needed.	The solutions identified won't be developed in the timescales identified.	Strong project and programme management put in place Business Plans are developed with the services and ICT to ensure the right resources are both costed and programmed into resourcing plan. Programme Sponsor Meetings take place fortnightly and are attended by ICT to discuss resourcing issues.
4.	Technical solutions take too long to deliver or may not be technically possible in the time frames required.	Building the new website and ICT building blocks has been more complicated and is taking more time than was anticipated	The business solutions cannot be delivered until the technical solutions are in place. The savings and income will not be achieved in the timescales forecast.	Strong project and programme management put in place Regular meetings between the programme team and ICT to discuss progress, communication back to business leads. ICT use an agile method of project management for the Design and Build phase. Technical Design Authority to have a monthly Online Board which authorises the focus of resources on resolving the infrastructure issues Programme Manager and Director regular update meetings with the Programme Sponsor.
5.	Inadequate management data to focus improvement efforts on the priority areas	The original data collected which detailed the highest levels of demand.	We may focus on areas that will not deliver the greatest change. As a result we may not get the best value for our investment.	Maintaining an awareness of any data limitations at board level before decisions are made
6.	A lack of	Services may prefer to	We only focus on a	Programme Sponsor to raise at

	corporate engagement in the programme	work in silos and not engage with corporate programme but rather deal internally with issues being faced.	small part of the whole. As a result the potential of the programme will not be achieved.	client management meetings.
7.	Mistakes happening because of the pace of change causing service failure and reputational damage	Too much pressure on existing staff Inadequate planning	Solutions will not be properly tested and developed before they are implemented. This may mean services not functioning correctly and transactions not being able to be delivered.	Strong programme planning and management ensuring there is sufficient capacity to introduce change at the same time as managing the day to day demands
8.	Failure to close down other channels	Lack of faith in digital channels and digital inclusion approach	Channel shift will not take place at the level required	Ensure that digital channels and digital inclusion approach are robust and there is evidence for their effectiveness Seek Member sign off to channel shift principles before enacting

5.6 Equalities and Diversity

5.6.1 An Equalities Impact Assessment is included as Appendix 2 to this report and concludes that the combined changes proposed by the strategy will not have a detrimental impact on customers with protected characteristics. However, once a full business case with implementation plan is developed, and the results of the consultation are known, EIAs for individual service changes can be completed where needed.

5.6.2 The strategy recognises that there is a section of the community for whom face to face and telephone channels will be needed, and certain services where face to face access is required to achieve the optimum outcome. The proposed changes to face to face should not exclude any customer from accessing a service they need.

5.6.3 A key aim of the strategy is to focus valuable staff resources on the residents who most need it, supporting residents who have more complex needs.

5.6.4 The data tells us that over 82% of Barnet residents are competent, regular internet users, yet around 80% of our contacts are still by phone, because we are not providing sufficient visibility to customers over the progress of their requests, and manual processing by staff can lead to delays and errors. This means that investment in making services more digital, end-to-end, and accessible via self-service, will be welcomed by the majority of the borough's residents.

5.6.5 The strategy proposes that to support customers less able or confident using the website or other self-service options, more self-service assistance will be offered, beyond that which is already provided by customer services staff at the two existing face-to-face centres. The detail of this support will be developed as part of the proposed face to face review and the Digital Inclusion Strategy.

5.7 Consultation and Engagement

5.7.1 As a matter of public law the duty to consult with regards to proposals to vary reduce or withdraw services will arise in 4 circumstance:

- Where there is a statutory requirement in the relevant legislative framework;
- Where the practice has been to consult or where a policy document states the Council will consult then the Council must comply with its own practice or policy;
- Exceptionally, where the matter is so important that there is a legitimate expectation of consultation; and
- Where consultation is required to complete an equalities impact assessment.

5.7.2 Regardless of whether the Council has a duty to consult, if it chooses to consult, such consultation must be carried out fairly. In general, a consultation can only be considered as proper consultation if:

- Comments are genuinely invited at the formative stage;
- The consultation documents include sufficient reasons for the proposal to allows those being consulted to be properly informed and to give an informed response;
- There is adequate time given to the consultees to consider the proposals;
- There is a mechanism for feeding back the comments and those comments are conscientiously taken into account by the decision maker / decision making body when making a final decision;
- The degree of specificity with which, in fairness, the public authority should conduct its consultation exercise may be influenced by the identity of those whom it is consulting; and
- The consultation is clear on the reasons why, and the extent to which alternatives and discarded options, have been considered.

5.7.3 Barnet Council is committed to involving residents, businesses and service users in shaping the borough and the services they receive. Consultation and engagement is one of the key ways the Council interacts with and involves local communities and residents, providing them with opportunities to:

- Gain greater awareness and understanding of what the Council does
- Voice their views and understand how they can get involved
- Feed in their views to the democratic decision making process.

Formal public consultation on this strategy

- 5.7.4 Following this report being agreed by this committee, a consultation process will be launched no later than 18 January 2016 for a period of 8 weeks. This will comprise an online questionnaire published on Engage Barnet, and will be widely publicised via the Council's various communication channels, customer services interactions, and in the Council's two customer service centres. Paper copies of the questionnaire will also be made available for customers unable to use the internet and the consultation will also seek to hear the views of those that are digitally excluded
- 5.7.5 The consultation will seek to discover the impact that the following recommendations may have on the customers that use these services:
- Removal of staff contact options in favour of user-friendly self-service options, and the proposed approach to achieving greater digital inclusion
 - Reconfiguration of face to face access away from Barnet House, towards a couple of libraries in the east of the borough, and various locations in the west of the borough
- 5.7.6 Once specific service changes are being proposed, it is intended, that on a service by service basis, service users will be engaged in the design process.

5.8 **Insight**

- 5.8.1 The strategy makes extensive use of the most recent insight data available, including data from customer satisfaction surveys.
- 5.8.2 The Council has a set of design principles for a positive customer experience that were developed in autumn 2013 through workshops with residents representing the diversity of Barnet. These principles will be used to design changes to customer access.

6. **BACKGROUND PAPERS**

- 6.1.1 Decision of the Assets, Regeneration and Growth Committee on 1 June 2015 to approve the recommendations of the London Borough of Barnet Accommodations Options Review, item 12:
<https://barnet.moderngov.co.uk/ieListDocuments.aspx?CId=696&MId=8309&Ver=4>