

Delivery Unit: Customer and Digital Services

Cost of Living Support

Cross-stakeholder resident experience design workshop

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1. Executive Summary

Following the [P&R committee report](#) in June 2022, defining scope of a cost-of-living approach and action plan, it was agreed to conduct an internal workshop to explore next steps and opportunities to better support our residents.

This report provides a summary of feedback and insights from the Resident Experience-Cost of Living workshop facilitated in-person on the 17th of August 2022 with 21 staff representing 12 service areas across Barnet Council and the Barnet Group. The insights help determine recommendations and next steps to improve financial support and guidance offered by frontline staff to residents.

The objective of the workshop was aimed to understand the current landscape across teams offering financial support to residents and start to build a collaborative and cohesive approach to:

- triage residents in need of financial support or at risk of financial hardship.
- explore opportunities to improve support offered.
- report on the impact of financial support offered when residents access council support and services.

1.2 Analysis highlights

Segment 1 | Mapping experience journeys of residents with financial needs

This segment focused on mapping experience journeys of 4 resident personas requiring financial support. The key themes identified (positive or negative) that impact the support offered to residents at various stages of the journey, have been highlighted below.

Key themes discussed

- 1 **Signposting and referrals process:** Residents requiring financial help may lack clarity over the key issue or are likely to be unaware of other support or services that can support their needs. Support staff need to evaluate the requirement to refer vulnerable residents to multiple services (which could be within or outside the Council)
- 2 **Resident effort and incentives:** Vulnerable residents or residents ashamed of their circumstance tend to lack incentives to follow up and follow through with advice and referrals where there is additional effort required.
- 3 **Stage 1 contact information and advice:** It was highlighted that most residents contacting the council will have already seen basic information about the service (online) and is contacting for advice or an issue to be resolved rather than being sign-posted back to information online.
- 4 **Proactive updates and ongoing support:** Staff are unable to follow up with residents or provide proactive updates when a service request referral has been made but hasn't yet been assigned or handed over in full to a case worker / staff member. This was perceived to be due to lack of resources or visibility of data to support the resident directly.
- 5 **Holistic approach:** Disjointed services and community networks was highlighted as a key barrier. Each team was clear on what they offered but often in isolation, there was not an understanding of the 'whole', or what other teams offered to support residents.
- 6 **Navigating help and options:** Both staff and residents struggle to navigate contact options and the digital offer and recognition there was not a single point of access for 'cost of living' enquiries
- 7 **Service perception and terminology:** There are pre-conceived notions about service labels like income collection officers. The terminology can make residents very anxious and prevents them from proactively reaching out for support and guidance that is already available

Segment 2 | Brainstorming ideas to improve financial support and guidance offered

This segment focused on brainstorming ideas within 3 areas of improvement. The key themes identified are collated based on similar ideas shared across groups including:

Key themes proposed:

1. **Proactive vulnerability checking/intervention:** Improving and developing collaborations with services and community networks that already provided financial need referrals like; schools, food banks, CTAX / rent arrears, housing options.
2. **Improving digital offer and reach, defining ‘cost of living offer’:** Improving website information and user journey on cost of living, financial support. Providing clarity on contact options and what they can provide upfront. Proactively sending information to those that are and are likely to remain digitally excluded.
3. **Increasing advisor resources:** Support customer service teams with resource and funding where they currently are unable to extend additional support and proactive follow ups to residents. Recognising current staff pressures to deliver the reactive ‘day-to-day’. Additional targeted support to provide more preventative intervention.
4. **Support based branding:** Provide a single source of information and guidance for residents – across information and contact channels. Explore options for a cross-service financial support team (which could be multi-disciplinary) or re-branding of existing teams that already have the capacity to offer support but aren’t perceived by residents to do so.
5. **Staff training and information:** Building a cross service checklist on keywords, signs and symptoms that can help identify residents facing financial hardship or are financially vulnerable. Develop guidelines on managing expectations.
6. **Improving information visibility internally:** Improving visibility and reach of financial support and grants available across the organisation as they update.
7. **Invest and scaling tech solutions:** Invest in tools and platforms that help target and prevent financial vulnerabilities and hardships like; Experian, One Citizen etc.

1.3 Analysis gaps

A gap identified in the analysis is identifying how and when service areas and teams contribute to financial support at various stages – understanding if services and teams are aware of their role within the wider service delivery context. There is also a need to consolidate resident insight on cost of living and financial support currently being collected across services.

1.4 Recommendations and next steps

Crisis management improvements

Recommendation	Description
1. Triage tool	<ul style="list-style-type: none">• Develop a triage tool based on key crisis areas (rather than service offering). For example, food poverty, fuel poverty, and employment advice.• In tandem with triage tool boost existing resident experience live training offer to train staff on using the triage tool.

2. Barnet Council Website	<ul style="list-style-type: none"> • Providing option for cost-of-living support information to be up front on Barnet Council Website home page. • Reviewing and updating content on existing cost of living page to reflect what residents need, are likely to look for, and key crisis areas (rather than services) • Providing guidance and clarity upfront on what various links and contact options can offer.
3. Advisors' Hotline	<ul style="list-style-type: none"> • Explore options to add to the contact centre a direct redirection for cost of living / financial support that can be connected through to an existing advisory service that can provide a holistic cross-service approach.
4. Cost of Living Network	<ul style="list-style-type: none"> • Continue to liaise with CoL workshop network and build on the group as a means of information dissemination across services and regular debrief sessions on resident needs and feedback at the front door. • Define what the holistic offer for cost-of-living support is across teams (internal & external) • Review team 'branding' - terminology/language to reduce anxiety when residents make contact.
5. Joining up support and community networks	<ul style="list-style-type: none"> • Building liaisons with and between community networks that services already signposted and refer residents to.
6. Consolidate existing resident insight	<ul style="list-style-type: none"> • Consolidate resident insight on cost of living collected across services.

Longer term improvements and next steps

Having a holistic understanding and consensus of the role various services and teams play in the delivery of financial support and advice is crucial to assessing customer service needs and measuring the impact of front door services.

An overarching next step to be considered in the long-term improvement of front door services is to develop holistic review and design processes. These processes should help examine:

- What the existing front door support offer is across services and networks for complex needs like financial support and rising cost of living.
- The impact front door improvements and referrals have on service capacity, delivery, and quality.
- What reporting and insight mechanisms are available and used to measure support impact on residents.

Long-term improvements will also link to the digital strategy to build long term tech solutions e.g. data Lake/CRM requirements.

In addition, the areas of improvement listed below will help evaluate and continuously contribute to the long-term transformation of support and guidance offered to residents with complex needs.

<p>1. Improving access and inclusion: Continue to improve and scale existing support offer, supporting residents with complex and accessibility needs. Extend options for drop-ins and develop staff directories and/or fact sheets to assist support offer. Continue to improve contact centre options to speak to someone and improve support options for those with language or digital barriers. Improve options for digital communication.</p>
<p>2. Integrate proactive vulnerability checks and interventions: Collaborate with MECC and partners to develop best practices and vulnerabilities signs and symptoms check list for staff.</p>
<p>3. Continue to develop resident-centric approach: Validate what residents need – continue to build resident experience insights and co-design through resident voice.</p>
<p>4. Improve quality of support offered first time: Explore options for multi-agency support offer and advisory services during stage 1 contact.</p>
<p>5. Develop single view of resident: Develop tools or processes to database and increase visibility of signposting and service referrals made.</p>
<p>6. Continue to build resident centric culture: Roll-out existing live scenario-based customer service training as ongoing offer.</p>

2. Background and Context

Following an update to [P&R committee on 8th June 2022](#), the importance of improving our customer services and front door support has been further highlighted by the increasing cost of living and demand on services. Feedback from residents, VCFS and Council frontline services, has highlighted an opportunity and increasing need to offer guidance, support, and help for financial wellbeing in the borough.

Since May 2022 the Resident Experience team have been engaging with residents getting insight on what residents need and expect from customer services. These insights have included feedback on financial support with residents wanting:

- *'Direct access to financial support and actionable help when they contact the council rather than being referred to advisory, community, and wellbeing services. For example, getting direct help with getting bills paid, accessing funds'*
- *'Wanting benefits information provided at any point to be practical and helpful. To consider how information will be used pragmatically.'*
- *'Providing clear rationale for decision making (benefits and financial support) – as a proactive step.'*

The Resident Experience – Cost of Living workshop was facilitated as an important step to hear from frontline staff who provide assistance to residents providing welfare and financial support, debt management or general advice to gain a holistic view on what activity is currently taking place and any gaps that exist to enable a targeted approach for those in debt and experiencing financial vulnerabilities.

The objective of the workshop was aimed to understand the current landscape across council services offering financial support to residents and start to build a cohesive approach to:

- triage residents in need of financial support or at risk of financial hardship
- explore opportunities to improve support
- report on the impact of financial support offered when residents access council support and services

2.1 Service Representation

21 colleagues participated in the workshop and represented 12 of the following services:

- Adults and Health – Care quality and customer financial affairs
- Adults and Health - Public health, assessments, and prevention
- Barnet Homes -Customer Experience
- Barnet Homes -Housing options
- Barnet Homes – Income collection
- Barnet Libraries
- BOOST
- CSG – Customer services
- Prevention and wellbeing (Insights & Intelligence)
- Resident experience - Customer and digital services
- Revenue and Benefits
- Strategy, communications, and engagement

2.2 Workshop summary and feedback

Segment 1 | Introductions and Icebreaker

Staff representatives introduced their roles and responsibilities and described how their work impacts resident experience.

Observation: Instances where residents had a positive experience and outcome depended on the personal initiative and expertise of the staff member, rather than a consistent standard across the team.

Segment 2 | Experience Mapping

Cross-service groups mapped the front door experience of 4 resident personas and financial needs scenarios, answering the following questions:

- What does the resident already know?
- What does the resident want to know?
- What do the staff already know?
- What do the staff want the resident to know?
- What are the barriers at this stage preventing us from supporting the resident?

Summary of mapping and feedback

What does the resident already know?

- Resident personas would know what services and support are available but may be unsure of where and how to access them.
- Residents are aware of their impairments, needs, and affordability.
- Resident may already be aware of their local networks, neighbours, WhatsApp groups.
- Residents may have already experienced the limitations of digital and contact channels.
- They may also already have a pre-conceived notion about service inconsistencies.
- Residents are likely to already know about all the basic services like libraries, universal credit, food banks. But may not be aware of nuanced / targeted support.

What does the resident want to know?

- What services and support does the council directly offer?
- How, when, and where to access support?
- How to contact specific people, services at the council?
- Help evaluating the best options for their circumstance.
- Services to assist with making applications, submitting forms etc.
- Locations, timings, and step by step processes.

What do the staff already know?

- General awareness of resident's current circumstance
- Available services
- Timescales
- Means for residents to ask questions
- May have the means to identify if the resident is vulnerable
- Signposting and referral processes

What do the staff want the resident to know?

- Alternatives to traditional financial support
- Empathy – that help is available
- Advice on various services that can help
- Options and guidance to check if all required paperwork is available to the resident
- Which staff / team could help?
- Benefit advice
- Managing expectations
- Support networks and face to face support options

What are the barriers at this stage preventing us from supporting the resident?

- Lack of resident engagement and trust.
- Digital barriers and lack of awareness (both staff and residents).
- Face to face and home visit options and resources.
- Data on language and access barriers.
- Reassurances through tech and visual platforms.
- Varied and disjointed systems used – data sharing and GDPR limitations.

- Staff skills and consistency.
- Lack of clarity over key issues. Lack of proactive knowledge of resident circumstances.
- Disjointed support and community networks.
- How to access information.
- Direct benefit and cash options.
- Lack of holistic end-to-end service. Fragmented services and siloed working.
- Lack of options for proactive working and targeted prevention.
- Lack of people (staff) resources.

Segment 1 | Observation

A typical experience journey has 5 key stages from start to finish (refer appendix for details). During the experience mapping exercise colleagues had clear visibility and understanding of the first 2 stages of the resident experience including signposting to and providing support on service awareness and referrals but were missing links to resident action and service delivery. Some reasons for this may be limitations of the role and responsibilities of staff offering support at the front door, or lack of visibility and access to progress beyond the referrals / signposting process.

Segment 3 | Solutions Brainstorm

Cross-service groups brainstormed solutions areas and gave feedback on ideas that can support a crisis and those that can improve services long term. Representative staff provided ideas for the following categories:

- Ideas to identify if a resident is financially vulnerable
- Systems / processes that can help database and report on financial sign-posting or support given
- Consistent standards to support financially vulnerable residents across services

Groups were also asked to highlight risks or blockers to implementing ideas.

Ideas to identify if a resident is financially vulnerable

- Proactively checking for vulnerabilities
- Picking up on keywords, signs, and symptoms of financial vulnerabilities and hardship
- Asking residents
- Using targeted prevention tech tools

Signs

- Money problems
- Claiming benefits
- Arrears rent/CT
- Other debts
- Physical and house appearance
- Use of foodbanks
- Council assessments

Symptoms

- Not wanting to come off the phone
- Saying they are financially vulnerable
- Seeking financial support
- Not turning lights on/heating on
- Previous contacts to the council
- Say trigger words (e.g. struggle)

Other

- MECC (Make every contact count approach)

Consistent standards to support financially vulnerable residents across services

- Robust processes that cater for all needs
- Consistent standards
- Signposting to BOOST and internal organisations
- Single data lake/system
- Managing expectations
- Consistent knowledge throughout organisation
- Establish a CoL team
- Central MECC-style resource and fact sheets
- Staff training to increase knowledge and change attitudes
- 'One Barnet' approach – bring together council and community organisations
- Bring in residents to co-design
- 'Cost of Living' name change

Blockers/risks to implementing ideas

- Recourses/ finance
- Digital exclusion
- Lack of wider knowledge in the organisation
- Limited computer systems and databases
- GDPR
- Time
- English is not a first language for everyone
- Siloed working
- Different expectations/pressures on different services creates conflict
- Low capacity of V&CSs
- Website user journey and information
- Inconsistency across providers (capita different priorities vs LBB)
- Staff attitude
- Low-partnership buy-in
- Opening hours for libraries/support etc.
- Mental health problems
- Pride in asking for help
- Resident mobility/ability to access services

Segment 2 | Observation

Contribution of solution paths and ideas varied across the 3 idea categories provided to workshop participants.

2 categories saw a good contribution of feedback and ideas including:

- Identifying residents with financial needs or vulnerabilities.
- Developing consistent standards to support financially vulnerable residents across services.

1 category saw a lack of clarity and relevant solution paths:

- Systems or processes to database and report on financial signposting or support given.

Some reasons for this may be the lack of joined up existing processes or tech platforms to report on referrals made to services. Lack of consensus and understanding on the impact referral / signposting processes have on the service areas and resident experience.

End of Report

