

TORBAY COUNCIL

Report No: **CG/25/04**

Title: **Customer Focus Best Value Review**

To: Executive
Council

on 23rd September 2004
on 23rd September 2004

1. **Purpose**

1.1 To consider the proposals contained within the Executive Summary, Service Improvement Plans and Final Report, of the Best Value Review of Customer Focus.

2. **Relationship to Corporate Priorities**

2.1 The Council's present Corporate Priorities are:

- Corporate Ability – Getting back on track;
- Jobs and Industry – Towards a prosperous Torbay;
- Road Safety and Congestion – Improving road safety and access to and around Torbay;
- Social Services – Improving health and social care in Torbay;
- Affordable Housing – Improving access to good quality affordable homes;
- Education – Placing learning at the heart of our community; and
- Community – Targeted improvement actions to deliver our statutory responsibilities and meet the needs of our community.

2.2 If the recommendations identified by the Best Value Review of Customer Focus are adopted, in the medium to long-term they will underpin and support the Council's ability to meet all of its corporate priorities.

2.3 In the short-term the findings of the review relate directly to the Council's corporate priority of Corporate Ability – Getting back on track. In particular, the Council's Change Management Plan includes a commitment to Enhancing Community Leadership & Customer Focus.

2.4 Contained within the Council's Strategic Plan Transforming Torbay are the following fundamental beliefs and principles:

- **Customer Care**
We are committed to the courteous and fair treatment of our customers
- **Putting the public first**
Our services will be tailored to meet the changing needs of our customers
- **Equality of opportunity**
We will deliver services, which do not discriminate against any sector of the community, but at the same time we recognise the need to reflect cultural differences in services.
- **Open, responsive, accessible and accountable**
We will ensure that the Council is transparent in its decision-making, has accessible services, is responsive to the needs of customers and has clear lines of accountability.

The adoption of the recommendations identified by the Best Value Review of Customer Focus will go a long way to making these beliefs a reality.

3. Recommendation(s)

- 3.1 That the Council adopts the aim of improving its customer focus in accordance with the programme identified in section 3 of the appendix.
- 3.2 That the Council approves the recommendations of the attached Executive Summary and Service Improvement Plan, in order to implement the pilot project and undertake appropriate parallel activities.
- 3.3 That the Council supports each phase beyond the pilot phase, subject to a full business case being developed for each area.

4. Reason for Recommendation(s)

- 4.1 To enable the Service Improvement Plans that support the findings of the Review to be realised.

5. Key Risks associated with the Recommendation(s)

- 5.1 The key risks involved in not agreeing the recommendations are that:
 - The public's general satisfaction with the Council and their perception of the organisation as whole may not improve;
 - The Council may miss the opportunity to streamline its processes and ensure closer cross-organisational working;
 - The Council fails to take advantage of potential efficiencies and economies that may result from re-engineering our business processes, better understanding customer demand, better supporting our employees and adopting ICT solutions;
 - The Council will be left even further behind when compared to other private and public service providers, in terms of how it interacts with its customers and how members of the public can access services and information; and
 - The Council may potentially have to return funding it has obtained from central government as part of the authority's approach to eGovernment, if some of the Priority Service Outcomes are not achieved by April 2006.

We assess the overall risk rating of not adopting the recommendations as HIGH (15).

Likelihood	6	6			24
	5	5			20
	4	4			16
	3	3	6		
	2	2	4	6	
	1	1	2	3	4
		1	2	3	4
		Impact			

Low risk Intermediate risk High risk

The "x" in the above matrix denotes where the author has assessed the level of final risk to fall

- 5.2 By adopting a pilot and phased approach to implementing the recommendations contained within the Service Improvement Plans, risks in the short-term have been minimised.

We assess the overall risk rating of conducting a pilot in the short term as LOW (6).

Likelihood	6	6			24
	5	5			20
	4	4			16
	3	3	x6		
	2	2	4	6	
	1	1	2	3	4
		1	2	3	4
		Impact			

Low risk
 Intermediate risk
 High risk

The "x" in the above matrix denotes where the author has assessed the level of final risk to fall

- 5.3 In the medium to long-term, different risks will emerge if the Council looks to rollout the approach across the whole organisation. If fully realised, the re-engineering of the Council's approach to customer access is potentially one of the largest projects since unitary status. It is certainly on a similar scale to (if not wider reaching) than the restructuring of Children's and Adult Services. In the medium to long-term the project will have significant financial (capital and revenue), property and staffing implications, together with associated risks. These risks will need to be clearly identified and addressed as part of any post-pilot, robust business case. Appropriate project management arrangements will mitigate this and will have the benefit of learning lessons from the pilot.

We assess the overall risk rating of extending the pilot in the medium to longer term to be INTERMEDIATE (8).

Likelihood	6	6			24
	5	5			20
	4	4			16
	3	3	6		
	2	2	4	6	
	1	1	2	3	4
		1	2	3	4
		Impact			

Low risk
 Intermediate risk
 High risk

The "x" in the above matrix denotes where the author has assessed the level of final risk to fall

6. Alternative Options (if any)

- 6.1 Not agreeing the recommendations. This option would be a high-risk option as outlined in paragraph 5 above.

7. Background

- 7.1 The Best Value Review of Customer Focus commenced in September 2003, following on from some initial work that had been done with regards to developing a Customer Access Strategy and partly in response to criticisms contained within the Corporate Governance Inspection and Comprehensive Performance Assessment.

- 7.2 An initial challenge panel was held in October 2003 to establish and confirm membership of the challenge panel and steering group and agree a scope for the Customer Focus Strategy/Review.
- 7.3 A series of challenge panels were held subsequently, where position statements relating to specific access channels were presented and discussed. This included the results of various consultation exercises, baseline data from access points across the Council, site visits to other local authorities and organisations, etc.
- 7.4 A Customer Focus Awareness Day was held on the 21st June. These sessions, attended by Members, Service Managers, Directors, Assistants Directors and Front Line staff from across the Council introduced the findings of the review to date. A long term vision was presented, and attendees were given the opportunity to participate in a hands-on demonstration of Customer Relationship Management (CRM) in action, with representatives from the I&DeA Strategic Advisory Unit present to facilitate elements of the sessions.
- 7.5 A final challenge panel was held on the 7th September and involved Members from both political groups, officers from across the Council, I&DeA and external representatives from the public, private and voluntary sectors. At this panel it was agreed that a report be prepared for the Executive, recommending that a pilot study be prepared for one service area of the Council to evaluate the proposals and help identify the potential benefits to the customers.

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IMPLICATIONS, CONSULTATION AND OTHER INFORMATION

Part 1

These sections may have been completed by the Report author but must have been agreed by the named officers in the Legal, Finance, Human Resources and Property Divisions.

Does the proposal have implications for the following issues? If "Yes" - give details. <i>delete as appropriate</i>		Name of responsible officer
Legal	The legal and procurement implications will be limited during the pilot. In the longer-term there may be significant legal and procurement implications dependant on the approach adopted.	Bill Norman
Financial – Revenue	There will be software licence fee costs, which will be met from savings from the pilot. There will be initial up front revenue costs for the second phase and there will be a business case prepared at that time.	Paul Looby
Financial – Capital Plan	All capital costs for the pilot e.g. CRM will be met by funding secured through our successful eGovernment and Department for Work and Pensions bids. Further funding for any future phase will be the subject of a full business case.	Lynette Royce
Human resources	All HR costs for the pilot will be met within existing resources. There may be some minor adjustments to roles as part of the pilot. Further funding for any future phase will be the subject of a full business case.	Geoff Williams
Property	All property costs for the pilot will be met within existing resources. Further funding for any future phase will be the subject of a full business case.	Sam Partridge

Part 2

The author of the report must complete these sections.

Could this proposal realistically be achieved in a manner that would more effectively: <i>delete as appropriate</i>		
(i)	promote environmental sustainability?	No
(ii)	reduce crime and disorder?	No
(iii)	promote good community relations?	No
(iv)	promote equality of opportunity on grounds of race, gender, disability, age, sexual orientation, religion or belief?	No
(v)	reduce (or eliminate) unlawful discrimination (including indirect discrimination)?	No

If the answer to any of the above questions is "Yes" the author must have addressed the relevant issue/s in the main report and have included a full justification and, where appropriate, an impact assessment.

Part 3

The author of the report must complete this section.

	<i>delete as appropriate</i>	If "Yes", give details
Does the proposal have implications for any other Directorates?	Yes	In the short-term implications will be contained primarily within Financial Services and Corporate Governance Directorates. In the medium to long-term proposals may impact significantly on all Directorates within the Council and potentially partner agencies as well.

Part 4

Is this proposal in accordance with (i.e. not contrary to) the Council's budget or its Policy Framework?		<i>delete as appropriate</i>
		Yes
1.	If "No" - give details of the nature and extent of consultation with stakeholders and the relevant overview and scrutiny body.	
2.	If "Yes" - details and outcome of consultation, if appropriate.	

Part 5

Is the proposal a Key Decision in relation to an Executive function? (i.e. would generate expenditure or savings in excess of £100,000 or 20% of an approved budget OR affect more than 2,000 residents of the Borough.)	<i>delete as appropriate</i>	If "Yes" - give Reference Number
	No (not within the pilot)	

Part 6

Wards

All

Appendices

Appendix 1

Executive Summary (including appendices)

Documents available in Members' Room

Full Report

Baseline Position Statements

ViewPoint 8 Questionnaire and Findings

Background Papers:

See above.