
Chief Executive's Office

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Date: 22 March 2007

Chief Executive: Donna Hall

Chorley
Council

Town Hall
Market Street
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PR7 1DP

Dear Councillor

OVERVIEW AND SCRUTINY COMMITTEE - TUESDAY, 27TH MARCH 2007

I am now able to enclose, for consideration at the above meeting of the Overview and Scrutiny Committee, the following reports that were unavailable when the agenda was printed.

Agenda No Item

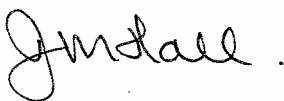
5. **Lancashire Shared Services Contact Centre Efficiencies and Partnership with Lancashire County Council Inquiry (Pages 45 - 70)**

To consider the Draft Final Report of the Corporate and Customer Overview and Scrutiny Panel's Inquiry into the Lancashire Shared Services Contact Centre Efficiencies and Partnership with Lancashire County Council (enclosed)

8. **Overview and Scrutiny Inquiry (Pages 71 - 78)**

To receive a report of the Director of Policy and Performance setting out the findings and recommendations of the Equality and Diversity Sub-Group.

Yours sincerely



Chief Executive

Enc

Distribution

1. Agenda and reports to all Members of the Overview and Scrutiny Committee for attendance (Councillor Dennis Edgerley (Chair), Councillor Thomas McGowan (Vice Chair) and Councillors Kenneth Ball, Thomas Bedford, Terry Brown, Alan Cullens, Francis Culshaw, Mrs Marie Gray, Harold Heaton, Greg Morgan, Geoffrey Russell, Mrs Iris Smith and Christopher Snow)
2. Agenda and reports to Donna Hall (Chief Executive), Lesley-Ann Fenton (Director of Policy and Performance), Gary Hall (Director of Finance), Sara Dobson (Policy and Performance Officer) Steve Pearce (Assistant Head of Democratic Services) and Gordon Bankes (Democratic Services Officer) for attendance.
3. Agenda and reports to John Walker (Executive Member for Customer, Democratic and Legal) for attendance.

This information can be made available to you in larger print or on audio tape, or translated into your own language. Please telephone 01257 515118 to access this service.

આ માહિતીનો અનુવાદ આપની પોતાની ભાષામાં કરી શકાય છે. આ સેવા સરળતાથી મેળવવા માટે કૃપા કરી, આ નંબર પર ફોન કરો: 01257 515822

ان معلومات کا ترجمہ آپ کی اپنی زبان میں بھی کیا جاسکتا ہے۔ یہ خدمت استعمال کرنے کیلئے براہ مہربانی اس نمبر پر ٹیلیفون

01257 515823
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Chorley Council

Final Report of the Corporate and Customer Overview and Scrutiny Panel into Contact Centre: Efficiencies and Partnership with Lancashire County Council



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1. PREFACE

Part of the 2006/2007 work program of the Corporate and Customer Overview and Scrutiny Panel agreed by the Executive Cabinet in June 2006 was an investigation into the Contact Centre Efficiencies and the Partnership with Lancashire County Council.

The Panel has now completed the Inquiry and the report with our recommendations will be forwarded to the Overview and Scrutiny Committee and finally to the Executive Cabinet.

It was agreed at the start of the Inquiry to create two sub panels: one to concentrate on Efficiencies and the other to focus on the Partnership between the Council and Lancashire County Council. Councillor Mrs Stella Walsh and Councillor Peter Baker chaired these two subs respectively.

I would like to thank the chairs and other members of the Corporate and Customer Overview and Scrutiny Panel for their commitment and enthusiasm in what has been a complex Inquiry.

Also my thanks to all council staff both internal and external for their help in enabling the production of this report.

Councillor Geoffrey Russell
Chair – Corporate and Customer Overview and Scrutiny Panel

2. EXECUTIVE SUMMARY

The Corporate and Customer Overview and Scrutiny Panel undertook a Scrutiny Inquiry into the Lancashire Shared Services Contact Centre.

This Scrutiny topic was selected because one of the key projects in the Corporate Strategy is to deliver Contact Chorley and the Shared Services Partnership.

The objectives of the Inquiry were split into two sections:

Efficiencies

1. To assess the contribution of the Lancashire Shared Services Contact Centre to the achievement of the Council's efficiencies agenda.

Partnership Working

2. To assess the effectiveness of the Partnership arrangements for the Lancashire Shared Services Contact Centre of both officer and Member arrangements.
3. To assess whether the Council is achieving the desired benefits of partnership working, for example, procurement, single point of access to services, efficiencies through extended opening hours and workload sharing.

The investigations have highlighted that the Contact Centre has delivered significant efficiency savings to date, with potential for even more in the future. The Contact Centre fits squarely with Government plans around shared services and is providing a model in our two-tier area that others may follow.

Contribution of Evidence

The Panel would like to thank all those who have provided evidence and contributed to the Inquiry, including staff at Chorley's Contact Centre, representatives from Lancashire County Council, Ribble Valley Borough Council and Pendle Borough Council.

The Panel would also like to thank Councillor John Walker (Executive Member for Customer, Democratic and Legal) and Councillor Dennis Edgerley (Previous Executive Members for Customers, Policy and Performance) for their contributions to the Inquiry.

Recommendations

The Corporate and Customer Overview and Scrutiny Panel, after taking account of all the evidence have made recommendations in the following areas: efficiencies generally within the Contact Centre, the Customer Relationship Management system and customer access to services, effectiveness of the Partnership arrangements and the desired benefits of Partnership working.

These recommendations are outlined in the findings table of this report.

3. INTRODUCTION

Background

The Overview and Scrutiny Committee referred an Inquiry entitled Contact Centre: Efficiencies and the Partnership with Lancashire County Council to the Corporate and Customer Overview and Scrutiny Panel.

The subject of the Inquiry was considered as part of the Programme of work for the Overview and Scrutiny function at the meeting of the Overview and Scrutiny Committee in June 2006. The topic was selected as the Contact Centre linked to the Corporate Strategy and the Council's priority of "improving access to public services" and "ensuring that Chorley Borough Council is a performing organization".

Aims/objectives

The Panel's aims and objectives for the scrutiny Inquiry were identified as follows:

Efficiencies

1. To assess the contribution of the Lancashire Shared Services Contact Centre to the achievement of the Council's efficiencies agenda.

Partnership Working

2. To assess the effectiveness of the Partnership arrangements for the Lancashire Shared Services Contact Centre of both officer and Member arrangements.
3. To assess whether the Council is achieving the desired benefits of partnership working, for example, procurement, single point of access to services, efficiencies through extended opening hours and workload sharing.

Terms of Reference

The terms of reference for the Inquiry were:

1. To conduct an investigation into the Lancashire Shared Services Contact Centre partnership arrangements.
2. To review the efficiency programme relating to the Lancashire Shared Services Contact Centre.
3. To identify possible improvements.
4. To report on the investigations findings and make recommendations to Overview and Scrutiny Committee consistent with the Inquiry's objectives and desired outcomes.

Inquiry Project Outline

The Panel completed the "Overview and Scrutiny Inquiry Project Outline" and is attached as Appendix A to this report.

Desired Outcome

Efficiencies

1. To maximise efficiencies from the Lancashire Shared Services Contact Centre partnership arrangements.

Partnership Working

2. To establish that the partnership arrangements are working effectively, and, in situations where this is not the case, to propose actions to remedy the situation.
3. To ensure the partnership is delivering the highest quality customer experience.

Corporate and Customer Overview and Scrutiny Panel Membership

Councillor (Chair) Geoffrey Russell (ES and PS)

Councillor Peter Baker (PS Chair)

Councillor Andrew Birchall (PS)

Councillor Alan Cain (ES)

Councillor Henry Counce

Councillor Magda Cullens

Councillor David Dickinson

Councillor Doreen Dickinson

Councillor Keith Iddon

Councillor Catherine Holye

Councillor Hasina Khan (PS)

Councillor Margaret Lees (ES)

Councillor June Molyneaux (PS)

Councillor Thomas McGowan

Councillor Edward Smith (ES)

Councillor Joyce Snape

Councillor Stella Walsh (ES Chair)

The membership of the Sub-Groups is indicated by (ES) for the Efficiency Sub-Group and (PS) for the Partnership Sub-Group

Officer Support

Lead Officer

Mr. Asim Khan

Assistant Head of Customer Services (Partnership Sub-Group)

Mr. Jim Douglas

Assistant Head of Office Support Services (Efficiency Sub-Group)

Democratic Services

Miss Ruth Hawes

Assistant Democratic Services Officer

General Information

Information on Chorley Borough Council's overview and scrutiny toolkit, policies and procedures can be found on the Council's website: www.chorley.gov.uk/scrutiny

4. METHOD OF INVESTIGATION

Documentary Evidence

The Panel received and considered several reports and documents, these included:

Efficiency Sub-Group

- Annual Efficiency Statement 2005/2006 Backward Looking and 2006/2007 Forward Looking,
- Current and future efficiency plans for Contact Chorley, Partners and examples of best practice,
- Performance Statistics for Contact Chorley,
- A comparison of the cost to the Council of the Partnership versus the cost to implement a solution on it's own.

Partnership Sub-Group

- Lancashire County Council Overview and Scrutiny report into the Shared Services Contact Centre submitted to the County Council Executive Cabinet on 5 September 2006,
- Chorley Customer Focussed Access and Design Strategy,
- Lancashire County Council Update on Customer Access report to Executive Cabinet on 28 February 2007,

Witnesses

The Partnership Sub-Group, at it's meeting on 19 January 2007, interviewed the following persons: Councillor Richard Sherras and Mr. Jeff Fenton (Corporate Services Manager) from Ribble Valley Borough Council and Mr. Philip Mousdale (Executive Director for Community Engagement) from Pendle Borough Council.

The Partnership Sub-Group, at its meeting on 26 January 2007, interviewed Councillor Dennis Edgerley (Previous Executive Member for Customers, Policy and Performance) and Councillor John Walker (Executive Member for Customer, Democratic and Legal).

Research

The Efficiency Sub-Group visited Contact Chorley on 24 November 2006 and the Partnership Sub-Group visited the Red Rose Hub on 8 December 2006. The Sub-Groups considered the views and experiences that were shared on these visits.



Chorley's Contact Centre



Councillor Smith listening in on a call at the Hub.

Panel Meetings

The agendas, reports and minutes of the Efficiency Sub-Group and Partnership Sub-Group held on can be found on the Councils website: www.chorley.gov.uk

5. FINDINGS

Objective/Key Issue 1: Efficiencies - To assess the contribution of the Lancashire Shared Services Contact Centre to the achievement of the Council's efficiencies agenda.

General Findings	Recommendation	Financial Implications
<p>Members discussed the two aspects of efficiency which are cashable savings and non-cashable savings, the non-cashable savings being the provision of value for money services.</p> <p>Evidencing real efficiencies through the Shared Services Contact Centre cannot always be stated in cash terms. The non-cashable element is the improvement in service delivery to the customer.</p> <p>It was unlikely there would be any cashable efficiency savings to claim for 2006/2007, but there should be by 2007/2008.</p>	<p>1, a. When Directorates are sending out information, such as Council Tax letters, to ascertain whether other information could be sent out at the same time to reduce the number of letters sent to customers. This could be raised at monthly meetings between customer services and those Directorates whose services are delivered by Contact Chorley.</p>	<p>The costs will be maintained within the Council's current budget. There may be some efficiency savings resulting from improving mailing.</p>
<p>The four highlighted some of the recommendations made by the Customer Overview and Scrutiny Panel Inquiry into the One Stop Shop in June 2004 that have been implemented. This included semi-automatic doors to the One Stop Shop, monthly meetings between customer services and those Directorates whose services are delivered by Contact Chorley.</p> <p>In addition to this the One Stop Shop has achieved the Chartermark for customer service and now delivers the concessionary travel scheme. Members noted the excellent atmosphere and pleasant, smart staff in the Contact Centre.</p>		

General Findings	Recommendation	Financial Implications
<p>Two of the authorities within the Partnership responded to the request for information on how they recorded efficiencies. One has not identified any efficiency savings from the Contact Centre and have increasing concerns that few, if any ever will be realised. Another are treating any claims that the Contact Centre will produce efficiencies with a wide degree of skepticism and have not included any efficiency savings to date in their Annual Efficiency Statement.</p> <p>The potential for efficiencies is relative to the size of the Council.</p>	<p>1, b. That the Council identify the current cost of dealing with customer contact for the various contact channels i.e. face to face, telephone, and that this be developed to quantify efficiency savings gained when customers email or text.</p>	<p>The costs will be maintained within the Council's current budget and part of the customer profiling project.</p>
<p>Tameside Metropolitan Borough Council have indicated that they have not attempted to formally identify efficiency gains from the implementation of their Contact Centre. However, Tameside measure on a monthly basis the 'cost per call' - the budget for staff salaries divided by the number of calls answered.</p> <p>A number of benefits are being realised within the Council's Service Directorates following the transfer of services to the Contact Centre:</p> <ul style="list-style-type: none"> • Monthly departmental meetings with Customer Services to improve service provision through more informed picture of customer demands. • Service Directorates are able to focus on service provision and enhancement • Customer surveys carried out through Customer Services rather than through individual Directorates. • Reduction in number of customer contact numbers in the back-offices. • Call overflow handled by One Stop Shop during peak times rather than service units having to cope and failing to do so. • 80% of Housing Benefits telephone calls are now being dealt with at first point of contact. • Projects that result in large-scale telephone contact can be dealt with through the Contact Centre rather 	<p>1, c. To identify any future improvements to customer service following the transfer of services into the Contact Centre and to report these in the six monthly update reports to Overview and Scrutiny.</p> <p>1, d. To prioritise areas for investment in integration to back office systems and identify simple transactions not requiring integration and thus reducing software licensing costs.</p>	<p>At this stage there are no additional costs anticipated.</p> <p>The cost of the Customer Relationship Management system and some limited integration is included in the budget for the Lancashire Shared Services Contact Centre Partnership. Other investment will be considered on the basis of a detailed business case which identifies the return on investment. There may be a reduction in costs for simple transactions not requiring integration.</p>

General Findings	Recommendation	Financial Implications
<p>than within individual departments, (i.e. postal voting 30,000 letters out to the public.</p> <ul style="list-style-type: none"> • Extended customer opening hours of 8am – 6pm. • Skilled staff dealing with service queries rather than back office staff. Customer • Services team have the interaction skills to provide high quality customer services • and improved customer experience 	<p>1, e. To start the business process reengineering exercise on high volume calls as this will help produce significant efficiencies and to create a task force (similar the to Change Team at Lancashire County Council).</p>	<p>This needs to be investigated further. Other investment will be considered on the basis of a detailed business case which identifies the return on investment.</p>
<p>The knowledge obtained through transferring services has highlighted where potential service problems are.</p> <p>When services are transferred into the Contact Centre the business process re-engineering and systems integration reduce the back office costs.</p> <p>The Director of Development and Regeneration indicated that half of the cost of providing the first line of enquiry service for the Development Control and Building Control in 2007/8 will be transferred to Customer Services for the provision of the service and half will be included as a efficiency gain in the 2007/8 Forward Looking Efficiency Statement. This is an opportunity to quantify the efficiencies as it coincides with a restructure.</p> <p>This project has highlighted the need to look at business process reengineering on a corporate basis.</p>	<p>1, f. A resource has been transferred to Customer Services to deal with Planning Services calls. To monitor this to establish the cost to Customer Services in providing this service and to ensure that the level of service to the customer has been maintained.</p>	<p>No additional cost.</p>

Customer Relationship Management system Findings	Recommendation	Financial Implications																								
<p>The cost figures below enable us to compare the Partnership against what it would have cost the Council to implement their own solution.</p> <p>The costs are presented over the 7 year term of the agreement.</p> <p>GO IT ALONE</p> <table border="0"> <tr> <td>CAPITAL</td> <td>217,400 (system)</td> </tr> <tr> <td></td> <td><u>196,800 (see breakdown)</u></td> </tr> <tr> <td></td> <td>414,200</td> </tr> <tr> <td>REVENUE (SOFTWARE)</td> <td></td> </tr> <tr> <td></td> <td>(7 yrs at 35,798 per year)</td> </tr> <tr> <td>REVENUE (EQP, SERVICE MAINT)</td> <td></td> </tr> <tr> <td></td> <td>(7 yrs cost see breakdown)</td> </tr> <tr> <td><u>742,206</u></td> <td></td> </tr> </table> <p>COUNTY PARTNERSHIP</p> <table border="0"> <tr> <td>CAPITAL (one off payment)</td> <td></td> </tr> <tr> <td>REVENUE</td> <td></td> </tr> <tr> <td></td> <td>(7 yrs at 50,000 PER YEAR)</td> </tr> <tr> <td><u>445,000</u></td> <td></td> </tr> </table> <p>Therefore there is a saving of £297,206 over the 7 year contract period i.e. £742,206 - £445,000</p> <p>The Customer Relationship Management system is not yet in place, but will be a key part of the project as it records details about the customer, their contact with the Council and additional requirements such as disabilities or a language barrier.</p>	CAPITAL	217,400 (system)		<u>196,800 (see breakdown)</u>		414,200	REVENUE (SOFTWARE)			(7 yrs at 35,798 per year)	REVENUE (EQP, SERVICE MAINT)			(7 yrs cost see breakdown)	<u>742,206</u>		CAPITAL (one off payment)		REVENUE			(7 yrs at 50,000 PER YEAR)	<u>445,000</u>		<p>2, a. Working with the Lancashire Shared Services Contact Centre Partnership to set a realistic timetable for the implementation of the Customer Relationship Management system.</p>	<p>The cost of the Customer Relationship Management system is included in the budget for the Lancashire Shared Services Contact Centre Partnership.</p>
CAPITAL	217,400 (system)																									
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<p>Other services that are delivered from the One Stop Shop on a surgery basis are:</p> <ul style="list-style-type: none"> • Department for Works and Pensions, • Patient Advisory Services, • Citizens Advice Bureau, • Community Services with the Asian Women's Forum. 																										

Customer Relationship Management system Findings	Recommendation	Financial Implications
<p>The information that will be collected about customers on the Customer Relationship Management System will enable Customer Service Advisors to proactively offer services to customers. This potentially includes the provision of non-Council services that already happens in the One Stop Shop.</p>	<p>2, b. To support future developments with the Customer Relationship Management System to prompt the customer service advisor to suggest quicker and easier ways to access the service in the future on line.</p>	<p>The Council launches it's new website on 2 April 2007, which includes a broad range of self-service options for customers. Enhancements to this will be considered on the basis of a detailed business case which identifies the return on investment.</p>
<p>There is potential to use the Customer Relationship Management System, by storing the mobile telephone numbers of customers to text GB for a green bag and the a bag be posted out to the address associated with the mobile telephone number. This would enable resources to focus on providing services to hard to reach and vulnerable customers.</p>	<p>2, c. To promote the use of text messages for service request in future, such as recycling calendars and integrate this into the Customer Relationship Management system and to advertise this facility effectively on items such as green bags.</p>	<p>A further Business Case will be required to look at the wider corporate impact on service delivery for the use of SMS text messaging. The advertising costs will be maintained within the Council's current budget.</p>

Customer Access Findings	Recommendation	Financial Implications																								
<p>There are 4 contact channels for customers at present: by telephone, face to face in the One Stop Shop, self-service on the Council's website and by email. Customer Services staff also manned the reception at the Town Hall. The staff worked in the One Stop Shop and the Call Centre in rotation to gain experience in all areas. Subject to there being sufficient capacity staff in the One Stop Shop would act as an overflow and answer calls when the Call Centre was busy.</p>	<p>3, a. To review and simplify the Chorley Customer Focussed Access and Design Strategy in order to migrate customers onto more efficient channels of service delivery.</p>	<p>The Customer Access officer will be in post shortly. Other investment will be considered on the basis of a detailed business case which identifies the return on investment.</p>																								
<p>Previously it was not possible to gather the number of customer calls received by Service Departments. The telephony system in the Call Centre captures the call abandonment rate, call disruption, variety and type. This information is used to plan the numbers of staff needed to staff the Call Centre. The transfer of calls to the Call Centre releases back office staff to concentrate on complex service issues.</p>	<p>3, b. To examine the reasons why customers contact the Council to determine any root causes that can be resolved and therefore reduce unnecessary contact by customers.</p>	<p>The Customer Relationship Management System will considerably help with this. The cost of the system is included in the budget for the Lancashire Shared Services Contact Centre Partnership.</p>																								
<p>From a total of 135939 calls, between 1 June 2006 and 28 February 2007 9.7% were abandoned. The breakdown of calls offered between Directorates is as follows:</p> <table border="0" data-bbox="1340 257 1524 582"> <tr> <td>Switchboard</td> <td>69035</td> </tr> <tr> <td>Recycling</td> <td>15639</td> </tr> <tr> <td>Abandoned Vehicles</td> <td>449</td> </tr> <tr> <td>Waste management</td> <td>704</td> </tr> <tr> <td>Refuse</td> <td>2272</td> </tr> <tr> <td>General Environmental Services</td> <td>114663</td> </tr> <tr> <td>Garden Waste Bins</td> <td>13</td> </tr> <tr> <td>Public Space Services</td> <td>2247</td> </tr> <tr> <td>Benefits</td> <td>9509</td> </tr> <tr> <td>Electoral Registration</td> <td>1121</td> </tr> <tr> <td>Council Tax Billing</td> <td>20863</td> </tr> <tr> <td>Council Tax Recovery</td> <td>2624</td> </tr> </table>	Switchboard	69035	Recycling	15639	Abandoned Vehicles	449	Waste management	704	Refuse	2272	General Environmental Services	114663	Garden Waste Bins	13	Public Space Services	2247	Benefits	9509	Electoral Registration	1121	Council Tax Billing	20863	Council Tax Recovery	2624	<p>3, c. To look at Interactive Voice Response (IVR) as a means to deal with simple requests and therefore enabling the customer service advisors to deal with more complex service enquiries.</p>	<p>Technical development would be required at estimated cost of £3,000.</p>
Switchboard	69035																									
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<p>In 2006 the Department of Communities and Local Government found in a "take up" campaign of services in</p>																										

Customer Access Findings	Recommendation	Financial Implications
<p>Tameside that:</p> <ul style="list-style-type: none"> • A Face to Face transaction cost £14.65 per visit • A Call Centre transaction cost £1.39 per phone call • A visit to the Council Website cost 25p per transaction 		
<p>The Housing Benefits team undertake home visits and this is found to be more efficient as all paperwork required can be seen at one time.</p>	<p>3, d. To take up the opportunity to deliver more services via home visits, such as the offer of a free bus pass and other service providers, for example, the Fire Service.</p>	<p>This will not be known until the ongoing Housing Benefits home visits project is completed.</p>
<p>The transfer of services has given the Council a much clearer picture of customer requirements and demand in these service areas for example, a high percentage of calls relating to Environmental Services are requests for new recycling calendars and green recycling bags.</p>	<p>3, e. To have a section in the committee report template to highlight if the report affects customers.</p>	<p>No additional cost.</p>

Objective/Key Issue 2: Partnership Working - To assess the effectiveness of the Partnership arrangements for the Lancashire Shared Services Contact Centre of both officer and Member arrangements.

Throughout the Inquiry the Members considered reports from Lancashire County Council, where appropriate these have been referenced and quotation marks used.

Findings	Recommendation	Financial Implications
<p>Partners were able to develop their Customer Relationship Management system independently to enable them to utilise the benefits of the Customer Relationship Management system. The second phase was to enable the County and Districts to deliver services for each other.</p> <p>The relationship between Lancashire County and Chorley would be key in achieving this and would realise massive benefits, such as extended opening hours after six in the evening and Saturday mornings.</p> <p>“At the Lancashire Shared Services Partnership Board on the 15 December 2006, it was agreed that the existing vision for the partnership was an aspirational target and there was therefore a need to refine and clarify these objectives into a short term vision statement.</p> <p>“This refined vision is significant in light of the Local Government White Paper and enhanced two-tier working agenda and provides a focus for future partnership working”.</p> <p><i>LLC report</i></p>	<p>4, a. To support the refined long term vision of the Partnership to deliver Lancashire County Council and District partner services and to support the refined vision statement.</p> <p>Please see Appendix B.</p>	<p>No additional cost.</p>
<p>It is acknowledged “The aim of the project to be a completely joined up contact centre with 13 members is unrealistic. It is even more unrealistic given that only 6 of the districts joined the project, as it raises the added complication of relations with the non-members. It is clear that the priorities of the different councils, although linked, are different. All parties have acknowledged that there</p>	<p>4, b. To ensure that the governance arrangements for the Partnership are effective by revisiting the terms of reference for the Joint Committee and to review the vision and project plan every 6 months and monitor effectively the timescales set down in the project plan.</p>	<p>No additional cost.</p>

Findings	Recommendation	Financial Implications
<p>was a failure to recognise the size of the task at the outset. An appropriately senior and well qualified project manager should have been appointed at the outset of the project, and should have received the necessary authority from the organisation, being answerable to the most senior officers and members.” <i>LLC report</i></p>	<p>4, c. To develop a mechanism for Partner Districts, Lancashire County Council and the contractor for effective communication.</p>	<p>No additional cost.</p>
<p>The role of the Partnership Officer is to liaise with districts and oversee the project. There are regular Project Boards and meetings of the Joint Committee to ensure two-way communication between the partners. As the Partners get to know each other the working relationship becomes stronger and it has taken time for Lancashire County Council (LCC) to get their team of staff in place.</p> <p>Previously Lancashire County Council undertook the management of the contract. Districts need to take a more active role in this.</p> <p>The inconsistent membership and unclear agendas of the Joint Committee meetings mean that this meeting has not been as effective as it needs to be going forward.</p>	<p>4, d. To make the Joint Committee meeting effective it is suggested that the quorum is changed to a majority vote system with absent partners given the opportunity to respond electronically to any decision.</p>	<p>No cost to Chorley Council.</p>

Objective/Key Issue 3: Partnership Working - To assess whether the Council is achieving the desired benefits of partnership working, for example, procurement, single point of access to services, efficiencies through extended opening hours and workload sharing.

Throughout the Inquiry the Members considered reports from Lancashire County Council, where appropriate these have been referenced and quotation marks used.

Findings	Recommendation	Financial Implications
<p>Lancashire County Council “delivers around 700 different services. It is clearly a massive task to review these, and is a process that will take years, not months.</p> <p>“A “Change Team”, operating from within the Customer Access project to coordinate and work with directorates has been introduced in Spring / Summer 2006.”</p> <p>There are currently four teams on banks of desks who deliver a mix of services, including the switchboard. Each team concentrates on two or three services at a time. There are thirty Full Time Equivalents with eighteen part time staff who cover lunch breaks and peak times. This will increase over time when more services are integrated and in January upstairs will be full. Downstairs is currently the nursery bank but will be live workstations in time.</p> <p>There are currently seven hundred entries on the Corporate Information Database. The aim is to give customers access to all service at one point, for example if a call is in relation to a blue badge the customer will be asked if they would like a fire safety check, or if a customer has just turned 65 they would be asked if they wanted like information about social services. The system transfers any relevant information to the back office meaning that the customer will not have to repeat the information.</p>	<p>5, a. For Lancashire County Council to provide Districts access to their Information systems where necessary to enable delivery of joint services.</p>	<p>No cost to Chorley Council.</p>

Findings	Recommendation	Financial Implications
<p>There are training facilities at the Hub.</p> <p>The Chorley Council and Lancashire County Council customer advisors are highly trained in customer services. "There has been some demand from Directorates for the Customer Service Centre to undertake 24 hour operation. A business case is being prepared and it is considered that it may well be feasible to provide a 24 hour service using a minimal number of staff by mid/late 2007. It is expected that extended opening times of 8am to 8pm will be in place at the Hub by April 2007". <i>LLC report</i></p> <p>Customers want their services and are not concerned who delivers them. The impact of the Partnership has included a change in organizational culture and the Partners have had different levels of success in integrating services into their Contact Centres, due to the size of the Authority, the demographics and corporate commitment.</p>	<p>5, b. To explore opportunities for joint training between Chorley and Lancashire County Council in the future.</p> <p>5, c. To support extended opening hours for Contact Chorley facilitated by the Hub and to publicise emergency contact arrangements in place during out of office hours</p>	<p>No cost to explore the opportunities.</p> <p>A financial model will be developed that is acceptable to Lancashire County Council and Chorley Council.</p> <p>The costs will be maintained within the Council's current budget.</p>
<p>Customer satisfaction is not measured in a consistent way across the partnership.</p> <p>There is not a consistent way of dealing with complaints across the Partnership.</p> <p>Some private companies provide excellent customer service, e.g. tracking on enquiries/deliveries.</p>		<p>No additional cost.</p>
<p>"The original Customer Relationship Management (CRM) system which provides the interface between the customer and back office systems has not functioned well enough to meet the needs of LCC and the District Partners. Since late summer LCC has been evaluating an alternative CRM also produced by Northgate. This product is a significant improvement over the original CRM. The new proposal has been extensively evaluated by LCC and the District Partners and at their meeting held on 13 February 2007 the Shared Customer Service Joint Committee agreed unanimously to a recommendation of</p>	<p>5, d. To explore joint working on the measurement of customer satisfaction via the Customer Relationship Management System and to deal with complaints more effectively across the Partnership.</p> <p>5, e. To look at other areas of excellent contact centre public/private sector initiatives and implement these if appropriate across the Partnership.</p>	<p>No additional cost.</p>

Findings	Recommendation	Financial Implications
<p>the Partnership Board to accept this alternative proposal.</p> <p>“It is anticipated that the terms of the revised Agreement to be finalised with Northgate will be radically different from those which currently apply in relation to the network, the software and the governance arrangements between Northgate and LCC. The basis of the Agreement will change from it being a fully managed service to one of supply only. It is anticipated that there will be a substantial cost saving to LCC and the current contributions from District Partners will continue at the existing levels. The Project Plan for this implementation and its associated governance is already under development in anticipation of an implementation start in April 2007.” <i>LLC report</i></p> <p>“Three libraries in Accrington, Fleetwood and Rawtenstall were chosen to pilot Face to Face services and became operational in late 2006. An evaluation of these pilot “gateways” will be conducted over the next three months”. <i>LLC report</i></p>	<p>5, f. That any future Lancashire Gateways developments or public service partnerships, such as Housing Associations, for Chorley be based in the One Stop Shop.</p>	<p>A financial model will be developed that is acceptable to Lancashire County Council and Chorley Council.</p>

6. CONCLUSION

General observations

After taking account of all the documentary and verbal evidence presented and the Corporate and Customer Overview and Scrutiny Panel has identified a number of recommendations which, if implemented, the Members consider will enhance both the efficiencies that can be achieved through the Contact Centre and the Partnership with Lancashire County Council.

Efficiency Sub-Group

Chorley is as far ahead as other Lancashire Authorities with regards efficiencies and that the potential to achieve efficiencies by utilising technology should not be underestimated.

The Sub-Group's noted the cross over between the two sub-groups, such as the importance of training, info gateways, delivering services for each other

Due to the delays with the Customer Relationship Management system Chorley had to move forward and use a one step at a time approach to transfer each service into the Contact Centre. Lancashire County Council have taken the opposite approach. The Sub-Group feel that Chorley's approach has been more successful.

One of the reasons the Contact Centre has been so successful is the enthusiasm and willingness of the staff to embrace the new approach.

The Customer Relationship Management system is critical in achieving Chorley's aims as it provides a better understanding of customer's needs and contact and therefore information on how to provide a better and more efficient service.

Partnership Sub-Group

The Partnership was a groundbreaking project with the initial vision for customers to access all services from a single point. This included a virtual network between the County and the six districts.

The Customer Relationship Management system is key to the future of the Partnership and the cost to the Council would be significant to purchase the telephony, hardware and software outside the Partnership. The potential for additional opening hours, in the evenings and at weekend are significant benefits.

If Chorley had not gone with the Partnership we would have faced problems, but different ones.

Other Authorities in the Lancashire Shared Services Contact Centre Partnership will be contacted electronically with the findings and recommendations of the Inquiry.

Lessons learned for Scrutiny

As there were two definite streams to the Inquiry the Panel appointed two Sub-Groups with five members. The Chair of the Panel sat on both Sub-Groups, with each Sub having a different Chair. This ensured continuity through the Subs and the added benefit of the knowledge and skills of the two Sub-Group Chairs.

The three Chairs have driven forward each step of the Inquiry and, in particular, the writing of the Final Report.

7. APPENDICES

Appendix A Overview and Scrutiny Project Outline

Appendix B Shared Services Contact Centre Partnership Three Year Vision Statement



OVERVIEW AND SCRUTINY INQUIRY PROJECT OUTLINE

<p>Review Topic: Contact Centre: Efficiencies and the Partnership with Lancashire County Council.</p>	<p>Investigation by: Corporate and Customer Overview and Scrutiny Panel</p> <p>Type: Inquiry</p>
<p>Objectives:</p> <p><u>Efficiencies</u></p> <ol style="list-style-type: none"> To assess the contribution of the Lancashire Shared Services Contact Centre to the achievement of the Council's efficiencies agenda. <p><u>Partnership Working</u></p> <ol style="list-style-type: none"> To assess the effectiveness of the Partnership arrangements for the Lancashire Shared Services Contact Centre of both officer and Member arrangements. To assess whether the Council is achieving the desired benefits of partnership working, for example, procurement, single point of access to services, efficiencies through extended opening hours and workload sharing. 	<p>Desired Outcomes:</p> <p><u>Efficiencies</u></p> <ol style="list-style-type: none"> To maximise efficiencies from the Lancashire Shared Services Contact Centre partnership arrangements. <p><u>Partnership Working</u></p> <ol style="list-style-type: none"> To establish that the partnership arrangements are working effectively, and, in situations were this is not the case, to propose actions to remedy the situation. To ensure the partnership is delivering the highest quality customer experience.
<p>Terms of Reference:</p> <ol style="list-style-type: none"> To conduct an investigation into the Lancashire Shared Services Contact Centre partnership arrangements. To review the efficiency programme relating to the Lancashire Shared Services Contact Centre. To identify possible improvements. To report on the investigations findings and make recommendations to Overview and Scrutiny Committee consistent with the Inquiry's objectives and desired outcomes. 	
<p>Key Issues:</p> <p><u>Efficiencies</u></p> <ol style="list-style-type: none"> Migration of resources from back office services into the Contact Centre. Integration to back office systems. Streamlining contact telephone numbers and email points. Managing migration of customers to more efficient methods of access to services. <p><u>Partnership Working</u></p> <ol style="list-style-type: none"> Review contractual arrangements with Lancashire County Council. Contractor performance and governance. Differing approach of partners. Customer Relationship Management system. 	<p>Risks:</p> <ol style="list-style-type: none"> Damaging relationships with partnership organisations. Possibility of negative publicity to the partnership. Having desired outcomes beyond the capacity to deliver.

<p>9. Development of Lancashire County Council Customer Service strategy. 10. Delivery of Customer Focus and Access strategy.</p>	
<p>Venue(s): Town Hall, Market Street, Chorley.</p>	<p>Timescale: 9 months Start: July 2006 Finish: March 2007</p>

Information Requirements and Sources:

Documents/evidence: *(what/why?)*

1. Lancashire County Council Customer Service strategy.
2. Partnership Customer Contact strategy.
3. Terms of reference for the officer partnership board and Member joint committee.
4. Chorley Borough Council Customer Focus and Access strategy.
5. Approved Plan and migration dates.
6. Annual Efficiency Statement: 2005/2006 Backward looking and 2006/2007 Forward looking.

Witnesses: *(who, why?)*

1. Chair of the Joint Committee.
2. Chair of the Partnership Board.
3. Representative from the contractor (Northgate Information Systems NIS).
4. Representatives from District partners.
5. Councillor D Edgerley (Previous Member of the Partnership Joint Committee).
6. Councillor J Walker (Executive Member for Customer, Democratic and Legal Services and Member of the Partnership Joint Committee).
7. Officers of Chorley Borough Council.

Consultation/Research: *(what, why, who?)*

1. Customer satisfaction performance statistics.

Site Visits: *(where, why, when?)*

1. Shire District partners.
2. Lancashire County Council.

Officer Support:

Lead	Officer:
Asim Khan (Assistant Head of Customer Services).	
Democratic Services	Officer:
Ruth Hawes (Assistant Democratic Services Officer).	
Corporate Policy Officer:	
To be identified as required.	

Likely	Budget	Requirements:
<u>Purpose</u>		£
Site visit costs		200
Total		<u>200</u>

Target Body¹ for Findings/Recommendations

(Eg Executive Cabinet, Council, PCT)

Overview and Scrutiny Committee.

Appendix B**Shared Services Contact Centre Partnership
Three Year Vision Statement**

This three-year vision is seen as the foundation to enable the partners to achieve the long term objectives of the Partnership.

Each partner is seeking to provide customers with easy and convenient access to all their services through the development of modern Contact Centres. Each council will work in partnership to achieve significant efficiency gains and service improvements through effective and appropriate sharing of resources and information.

The shared objectives of the Partnership are that:

- Each Council will offer a single point of access for all their services through their Contact Centres
- A two-way signposting service will be available between Lancashire County Council and the District Councils
- Overflow and extended hour opening will be developed as a discretionary service to the partners by Lancashire County Council
- The partners will work towards shared Contact Centres with co-located District and County Council staff
- Lancashire Gateways will be developed in consultation with the partners, within appropriate locations to support the overall aims of the Partnership
- The partners will share common systems and processes including Customer Relationship Management (CRM), telephony and training
- The CRM system will be hosted by Lancashire County Council
- The partners will open up membership of the partnership to other districts
- The partners will further develop joint working into other projects

The partnership will work towards these objectives between 2007 and 2009 and will develop shared programmes for each together with a business plan against which progress will be monitored and reported.

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Report of	Meeting	Date
Director of Policy and Performance	Overview and Scrutiny	27 March 2007

OVERVIEW AND SCRUTINY SUB GROUP EQUALITY AND DIVERSITY FINDINGS AND RECOMMENDATIONS

PURPOSE OF REPORT

1. To provide the overview and scrutiny committee with an overview of the work undertaken by the equality and diversity sub- group and to present the committee with suggested recommendations.

CORPORATE PRIORITIES

2. Ensure equality of opportunity and life chances, ensure Chorley Borough Council is a performing organisation.

RISK ISSUES

3. The issue raised and recommendations made in this report involve risk considerations in the following categories:

Strategy	✓	Information	
Reputation	✓	Regulatory/Legal	✓
Financial		Operational	
People	✓	Other	

4. Failure to continue to properly embed equality and diversity across the authority, may impact upon the reputation of the authority. Equality and diversity is also critical to the revised Comprehensive Performance assessment Framework for District Councils. The recommendations set out in the report will have an operational impact on all Directorates. Equality and diversity outcomes will be key to the result of any future CPA assessment.
5. **The aims of the Sub Group**
 - To develop an understanding of how equality and diversity fits with CPA and how equality and diversity can act as a driver to excellence
 - To develop the Council's approach to engagement and consultation and the way in which this informs service delivery
 - To gain an understanding of the various tools and information systems we could use to drive our progress around equality and diversity

- To explore ways of addressing issues of urban and rural splits with In the Borough and the impact this has upon catering for different communities with differing needs
- To understand how we can establish satisfaction and service needs baselines across all of our communities
- To develop mechanisms to ensure that our work around equality and diversity is making a difference for those communities most at disadvantage
- To explore we go about achieving level three of the equality standard, given the capacity issues we face as a district Council
- Establish some real practical ideas which we can take forward to improve outcomes for our communities.
- Change the culture internally
- Develop mechanisms to make service areas accountable for their performance in delivering equitable opportunities and outcomes for all
- To find ways of mainstreaming equality principles into everyday work

6. **Summary of the approach**

Members of the sub group met independently of the Overview and scrutiny committee on four occasions. A presentation and general discussion of equality and diversity, the opportunities, current gaps took place at the first meeting, which informed future activity of the sub group.

The manager of the Council's Customer Services met with the group to explore the provisions made at the for meeting the needs of customers with differential needs at the One-Stop Shop and Contact Centre at the Union Street Offices.

The council's GIS officer attended a meeting to discuss the potential use of the Council's GIS software which enables information to be fed into the system to be represented graphically on digital mapping sources.

It was agreed that the system could be developed to provide demographic and deprivation information and identify the localities of particular community groups within the Borough. This information could be useful in determining the specific parts of the Borough to which resources and action should be targeted.

Members of the sub group visited Staffordshire Moorlands District Council to explore their approach to equality and diversity. Staffordshire Moorlands comprises a population of 94,000 within three distinctive market towns, urban fringe settlements and surrounding rural areas. The Council, which employed 309 full time staff, has a current 'good' CPA rating, but was aiming for excellence, and had achieved Level Three of the Equality Standard in March 2006 and so it was felt that we could take some useful lessons from their journey. The visit also involved the examination the operation of one Staffordshire Moorlands 'Rural Kiosks' as part of the visit.

7. **RECOMMENDATIONS FOR ACTION**

Objective	Action	Timescale	Lead
Leadership and commitment			
Ensure that we have a comprehensive overview of our current position in terms of equality and diversity and the actions required to drive up performance	Conduct an equality audit as a starting point for driving up performance	April 2007	Policy and Performance
Ensure that a strategic overview of equality and diversity is maintained and the equality and diversity implications of decisions are fully explored and understood	Amend the Committee report template so that Equality and Diversity implications have to be outlined in standard reports in the same way as financial and human resources implications. Ensure that all reports are sent to Equality and Diversity lead for quality assurance and if necessary implications templates are completed. Also send reports to communications manager so that a proactive approach to communications around equality and diversity can be taken.	June 2007	Policy and Performance / Democratic Services
Clearly articulate to staff, members, and customers our equality and diversity principles.	Establish a set of diversity principles and promote them. Include in the induction pack for new employees and members.	April 2007	Policy and Performance
Inform our understanding of the needs of our Customers and Communities to drive forward our work around equality and diversity.	Undertake our own mini census and or Big Debate to provide additional baseline data so that we are able to understand and meet the needs of our communities	October 2007	Policy and Performance
Ensure that the needs of our customers and communities in Rural areas of the borough are fully accounted for in service design and delivery.	Include Rural and Urban considerations in Equality Impact Assessments – rural proof service delivery. Fr example the impact upon rural areas of planning policies which limit building on small areas of land.	April 2007	Policy and Performance
Ensure that all of our policies and procedures comply with Equality legislation and our diversity principles.	Undertake an Equality and Diversity Desk top exercise on policies and strategies	May 2007	Policy and Performance
Ensure that we take a partnership approach to addressing the issue raised by demographic change	Undertake partnership review of economic migration and an enquiry into how we collaboratively meet any identified needs.	June 2007	Policy and Performance
Ensure that accountability for driving forward the equalities	Establish an equality and diversity steering group (senior	April 2007	Policy and Performance

agenda across the authority is clearly established and a strategic approach to delivering equality is embedded across the authority.	officers) and equality and diversity working group- Equality Champions.		
Consultation and Communication			
Ensure that we use the proper tools to develop and understanding of the differential needs of our various communities.	Use GIS to map our communities according to a variety of socio-economic and demographic characteristic and use this to inform service provision. Provide all new members and staff with summary information.	May 2007	Policy and Performance / ICT
Ensure that the good work ongoing around equality and diversity is effectively captured and communicated and all staff, customers and members are aware of the provisions available for customers with specific needs.	Establish a mechanism to centrally collate information about the services provided for hard to reach groups and activity share this information with staff, councillors, customers and the community. Via the Loop?	June 2007	Policy and Performance
Ensure that adjustments made for customers who may experience language barriers when trying to access our services are fit for purpose.	Review the use of translating and interpreting services	June 2007	Policy and Performance
Gain a better understanding of the types of queries hard to reach/ hard to hear groups are approaching the Council with	Conduct a survey of customers attending the Youth and Community Service's surgeries at the One-Stop Shop, together with the nature of the enquiries	June 2007	Customer Services
Ensure that all staff and members are aware of the agencies operating within the borough who can help to progress equality and diversity outcomes for all of our communities	Compile a register of all details of Community Groups and partnerships in Chorley and work with the Chorley guardian to ensure that these are reflected in their publication.	June 2007	Leisure and Culture
Ensure that we address a gap in consultation forums and mechanisms to address our statutory duty around Gender Equality	Review our approach to consulting on Gender issues	July 2007	Policy and Performance
Ensure that the work of existing groups is actively communicated.	Activity publicise the work of the Asian Women's forum and work more effectively in partnership with the form to deliver improvements for target groups.	July 2007	Policy and performance
Service provision			
Inform a review of translation and interpreting services.	When people come into the one stop shop and use interpretation services monitor the take up of this service to inform our work around equality and diversity.	April 2007 Onwards	Customer Services
Ensure that customers accessing our services who do not speak	Signpost information for non-English speakers about English	April 2007 Onwards	Customer Services

English as a first language are made aware of the support services available	classes- partnership with Local College?		
Ensure that the licensing service is able to respond to service request from customers who do not speak English as a first language.	Give a copy of the Language Line leaflet to Licensing. The Council's Licensing Section could be encouraged to use the 'Language Line' facility in its dealings with customers	April 2007	Customer Services
Ensure that those who are licensed through the Council are able to fully meet the needs of customers with a disability.	Introduce specifically tailored training in licensing on the needs of customers with disabilities.	July 2007	Customer, Democratic and Legal Services
Ensure that we fully understand the needs of our customers and build a picture of where service delivery failure is disproportionate for particular groups or failing to meets the needs of various diverse groups.	Complaints Monitoring- monitor all complaints in line with the six strands of diversity and use this to inform service provision	April 2007	Policy and performance
Ensure that we offer the highest possible level of support to customers with particular needs with in the one stop shop.	Explore ways of ensuring the Customer Advisors within the one stop shop provide the optimum level of support to customers with particular needs, within resource limitations.	April 2007	Customer Services/ Policy and Performance
Ensure that customers who may be hard to reach or hard to hear are afforded with equitable access to our services, using advocate services as possible/ necessary.	Extend surgeries in One Stop Shop for Hard to Reach Groups- Age Concern/ Job Centre Plus. Explore possibility of working with partners (eg PCT to deliver services from the One Stop Shop).	April 2007 Onwards	Customer Services
Ensure that we fully understand the needs of our customers and build a picture of where service delivery failure is disproportionate for particular groups or failing to meets the needs of various diverse groups.	Ensure equality monitoring is included in all employee and customer feedback	August 2007	Policy and Performance
Ensure that we take a community leadership approach to actively address harassment and discrimination against equality target groups.	Extend remit of Multi Agency Diversity Incidents Panel to address hate incidents relating to all six strands of equality and diversity	April 2007	Policy and Performance
Employment			
Ensure that all staff are aware of and comply with statutory requirements around equality and diversity and are able to meet the needs of all of our customers.	Review our approach to equality and diversity training to ensure that it meets statutory requirements and the needs of our staff, customers and communities.	April 2007	Human Resources
Ensure that the Council as an employer is able to offer equitable employment opportunities and that our policies fully embed an equalities	Review the Council's suite of Human Resources policies amend and introduce new policies to further our equality objectives as an employer-	April 2007 Ongoing	Human Resources

approach.	possibly consider introducing a religious observances policy, time off for dependants policy, adoption policy.		
Ensure that staff have the skills necessary to enable us as a Council to properly engage with different groups within the Borough.	The personal specification for the new Customer Access Officer post with special responsibility for hard to reach groups could include a desirability for applicants to be able to speak one or more languages other than English.	April 2007	Human Resources/ Customer Services
Ensure that people from hard to reach groups are aware of vacancies within the Council as see Chorley as an equal right employer.	Advertise posts in a series of targeted publications – Stonewall, Carers UK, Disabled Go,	April 2007 Ongoing	Human Resources
Member Involvement			
Ensure that members receive equality and diversity training	Provide equality and diversity training for members. (Specifically tailored for chairs of diversity-targeted focus groups).	June 2007	Human Resources/ Policy and Performance
Ensure that members take every opportunity to engage with young people in the Borough	Gain a greater understanding of the ways in which members engage with young people and explore innovative ways of furthering this.	April 2007 Ongoing	Democratic Services

There are two outstanding issues which the sub group has not to date been able to fully address,

- **Access to services in Rural Areas**
- **Addressing satisfaction**

Further consideration will be given on an ongoing basis to how we tackle these issues as part of our bid to be recognised as an excellent Council.

8. CONCLUSION

It is clear that equality and diversity covers a broad ranging agenda, can incorporate Race, Disability, Gender, Age, Sexuality, Religion, elements of Community Cohesion and more- the remit is very comprehensive.

In its purest sense equality and diversity is about delivering equality of access, equality of quality and equality of outcome for all and ensuring that our diverse communities are valued and enabled to prosper. The recommendations outlined above set out the clearest ways in which we as a Council can achieve this using the tools at our disposal and learning from the journey that others have taken in embedding equality and diversity in their organisations. In delivering against equality and diversity objectives and ensuring that all of our customers are afforded equality of outcome and opportunity we will also be meeting many of the requirements of the CPA and embedding best practice across the organisation.

COMMENTS OF THE DIRECTOR OF HUMAN RESOURCES

9. The director of Human resources approves the recommendations in the above report.

COMMENTS OF THE DIRECTOR OF FINANCE

10. The report contains no direct financial implications.

RECOMMENDATION(S)

11. The recommendations at section seven be approved for implementation and monitoring.

ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

12. None

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