

THURSDAY, 14 JANUARY 2016

**REPORT OF THE PORTFOLIO HOLDER FOR OPERATIONS AND ASSETS****AGILE WORKING STAGE II****PURPOSE**

This report is to seek Cabinet endorsement to progress through the second tranche of Agile Working, including delivery of the 'Delivering Quality Services in Tamworth' project.

**RECOMMENDATIONS**

- a) That Cabinet endorse deployment of the second tranche of Agile Working including delivery of the 'Delivering Quality Services in Tamworth' project
- b) That Cabinet, as part of the budget setting process, endorse the release of £326,000 from Capital Contingencies for floor refurbishment and furniture as required

**OPTIONS CONSIDERED**

- a) Do Nothing
- b) Implement the second tranche of Agile Working and the 'Delivering Quality Services in Tamworth' project separately
- c) Implement the second tranche of Agile Working and the 'Delivering Quality Services in Tamworth' project simultaneously in order to bring about efficiency and fewer stages of change for the organisation's employees

**RESOURCE IMPLICATIONS**

Both the Agile Working tranche, and the 'Delivering Quality Services in Tamworth' project are being resourced internally, with dedicated programme and project management to ensure consistency in approach.

As the activities progress, there may be a requirement to bring in temporary staff to backfill, but only in the event that the cost of impact to service provision outweighs temporary staffing costs.

Project Teams are already in place to proceed as appropriate.

The contingency budget identified, detailed below, has been estimated following spend incurred in tranche 1 of Agile Working. At this stage, and until comparable quotations are requested, exact figures are not available. However, it is felt that no additional spend will be required over this budget. On completion of both projects, there will be further free space available within Marmion House as staff occupation is consolidated. This will allow rental capacity to partners which will potentially bring in revenue to the organisation.

**Contingency Budgets:**

Contingency - Agile Working - Floor Refurbishment	£228,000
GF Contingency Agile Working - Furniture	£48,000
HRA Contingency Agile Working	£50,000

The original business case approved by Cabinet estimated the return on the investment would mean payback would be achieved by 2017/18 with ongoing returns of c.£200k p.a.

However, discussions with partners are ongoing regarding the letting of the remaining vacant accommodation within Marmion House – which has delayed the potential payback to 2018/19. Should the vacant accommodation not be let and therefore the income of c.£100k p.a. not be achieved then payback would take a further 3 years, subject to the release for spend of the phase 2 costs of £326k.

	2014/15	2015/16	2016/17	2017/18	2018/19
	£'000	£'000	£'000	£'000	£'000
<b>Budgeted Saving achieved</b>	(103)	(103)	(103)	(103)	(103)
<b>Potential savings / income</b>					
Marmion House Rental / Service charge Income *			(102)	(102)	(102)
Costs - Phase 1	526				
Costs - Phase 2			326		
Net	423	(103)	121	(205)	(205)
Cumulative	423	321	442	237	31
Original Business Case	470	(73)	(201)	(201)	(201)
Cumulative	470	397	196	(5)	(207)

\* Potential income - subject to letting of Marmion House accommodation

The costs relating to the 'Delivering Quality Services in Tamworth' project can be met from within existing budget allocations. A saving of £100k p.a. from 2015/16 was included within the MTFS arising from the potential for Service Integration arising from the project – it is anticipated that any additional savings arising from the project implementation will contribute towards the ongoing longer term deficit highlighted within the MTFS.

## LEGAL/RISK IMPLICATIONS BACKGROUND

There are no legal implications to this project.

As with all corporate activities, there are risks. All risks have been identified as part of the project preparation, and will continue to be managed through the project lifecycle. New and increased risks are also being reported to CMT on a fortnightly basis to ensure early intervention where required.

Appointments and Staffing Committee (6<sup>th</sup> January 2016) approved a report that covers aspects of the corporate change process, protections for staff and detail regarding the implementation and management of competency frameworks.

## SUSTAINABILITY IMPLICATIONS

There are no sustainability implications to this project.

## BACKGROUND INFORMATION

Tranche 1 of the Agile Working project was completed in March 2014, within adjusted and corporately agreed timescales. This tranche was defined as the completion and inhabitation

of a single Agile Working Floor within Marmion House. Since that time, a number of the projects associated with the tranche have been subject to snagging and refinement and a comprehensive Post Implementation Review has been carried out. This information has been used to shape and inform the second and any subsequent tranches of the project. Other, currently indirectly affected workstreams have continued to progress and these are predominantly technology related activities where externally defined deadlines have been imposed.

The Post Implementation Review demonstrated fulfilment of many of the initial objectives defined by the project. It is anticipated that by completion of the project, all objectives will have been demonstrably met;

- An increase in work life balance
- Working space is used more efficiently
- Excess space within Marmion House is vacated so that it can be thus resulting in an increase in revenue for General Fund
- Improve the working environment for staff
- New technology embraced (e.g. virtual meetings)
- Employment costs minimised
- Absence minimised
- Productivity increased through better use of employees time
- TBC seen as an “employer of choice”

Outline proposals for Tranche 2 can be found at Appendix A.

Simultaneously to this project, the Customer Services Strategy has been reviewed and significantly revised to reflect the change in customer demand and to support the organisation’s Demand Management Operating Model. Activity resulting from this review has already seen significant improvements to the service, and a summary of ‘quick wins’ achieved by these improvements can be found at Appendix B.

In order to fully exploit a proactive and agile workforce, it is proposed to incorporate the ‘Delivering Quality Services in Tamworth’ project into the second tranche of Agile Working. This will see a significant change in the way the organisation delivers it’s services to the customer, improving customer experience, contributing to the deficit detailed in the MTFS and supporting the Sustainability Strategy. In addition, the combined projects will form a major part of the Corporate Plan. By incorporating ‘Delivering Quality Services in Tamworth’ it into the second tranche of Agile Working, the technologies, skill sets, operating procedures and communications will be completed more efficiently thus impacting fewer stages of change to the organisation’s employees.

The first tranche of the Agile Working project has been intrinsically linked with the Assets Strategy, and will continue to be, along with the ‘Delivering Quality Services in Tamworth’ project, in order to ensure a strategic, joined up activity. This will ensure that all strands of the projects are delivered efficiently and with minimal duplication, realising appropriate benefits and exploiting the organisation’s assets.

**REPORT AUTHOR**

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**LIST OF BACKGROUND PAPERS**

Appointments and Staffing Committee – 6<sup>th</sup> January 2016 – Delivering Quality Services in Tamworth.

Cabinet – 14<sup>th</sup> January 2016 - Corporate Review of Strategic Framework

Sustainability Strategy

Medium Term Financial Strategy

**APPENDICES**

Appendix A – Outline Proposals for Tranche 2 Agile Working

Appendix B – Customer Services Quick Wins

## **APPENDIX A – Outline Proposals for Tranche 2 Agile Working**

Organisational State : All Appropriate Services Delivered Electronically with 80% Customer Demand Handled Once

Timescale : December 2017

- Completed technology roll-out
- Completed telephony roll-out
- Corporate EDRMS in place with virtual post across the organisation
- Completed technical training
- Records Management Policy adopted
- Security awareness and training
- iMail roll-out
- Appropriate technology support in place
- Virtual conference facilities roll-out
- Disaster Recovery and Business Continuity Plans in place and robustly tested
- Effective and appropriate electronic communication methods
- Service Reviews completed and implemented
- Generic process review and continual improvement completed first pass
- All transactional services available through website
- Integration between CRM and website
- HR & Payroll Self Service
- Implementation of Customer Service Centre
- Customer Self Service
- Customer Communications
- Completed staff Relocations and asset refurbishments

**APPENDIX B – Customer Services Quick Wins**

Quick Win	Outcome/outputs	Costs/Dependencies/Capacity	Date for completion	Update 31 Dec 15	Savings 2015/16
Delivery of Customer Portal	Citizen authentication. Mobile app deployment Self service via the website	SCC picking up majority of cost. Capacity to be identified by project scope £4-5k for system integration Development of e-forms via the CRM	Feb 15  <b>Completed March 2015</b>	<p><b>Mobile App</b></p> <ul style="list-style-type: none"> <li>- Demo'd for CMT and Heads of Service – positive feedback received.</li> <li><b>Completed</b></li> <li>- J Shaw and Marina Musgrove visited Ombiel site for CRM integration.</li> <li><b>Completed</b></li> <li>- Project development and testing continues to progress well.</li> <li>- <b>Completed</b></li> <li>- South Staffordshire DC's CRM and form based testing is now complete. SSDC will shortly be followed by Lichfield DC and Tamworth BC, with the aim to complete testing this week</li> <li>- Completion of the GIS / GPRS build and test, which will allow citizens to 'find my nearest.....' is scheduled for build and test next week</li> <li>- The Project Board is meeting on Tuesday 24</li> </ul>	To be calculated as dependant upon take up  £5k (E)

				<p>February, for the final review and soft launch sign off.</p> <p>App launched with no advertising. <b>Completed</b></p> <p><b>Formal Launch conducted 13 May 2015, initial stats show usage at 29<sup>th</sup> June to 26<sup>th</sup> July</b></p> <p>Term dates and school holidays 23 Report it 11 Leisure 10 Council Tax 8 Waste / Recycling 8 School Meal Menu 7 Make a payment 7 Births Deaths and Marriages 5 Locations 5 Get in Touch 3</p> <p>Total Hits 1267</p> <p>1<sup>st</sup> June - 28<sup>th</sup> June</p> <p>Term dates and school holidays 49 Report it 73 Leisure 40 Council Tax 25 Waste / Recycling 39 School Meal Menu 31 Make a payment 27 Births Deaths and</p>	
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		Advertising campaign – £2K (incentive scheme, TV offer etc)	<p><b>July 2015</b></p> <p>End of April 15</p> <p>Complete</p>	<p>Marriages 27 Locations 29 Get in Touch 25</p> <p>Total Hits 2846</p> <p><b>Completed – herald coverage 23.7.2015</b></p> <p>Phase 2 now being worked on - meetings to take place with several heads of service, starting tomorrow to look at the next phase.</p> <p>Customer Service Team have been encouraging Customers to use the app.</p> <p><b>The app is marked via numerous channels. Flyers, cards and a website presences, along with a you tube video</b></p> <p><b>Customer survey</b> - drafted and ready to accompany end of year council tax bills. Additional surveys to be carried out in all locations. Data</p>	
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				<p>then to be overlaid and used in conjunction with Mosaic data (SCC to assist)</p> <p><b>Complete</b></p> <p><b>Self service</b>  - council tax process built for the mobile app will also be available for self serv via the website</p> <p>- <b>Corporate e-form</b> will be developed in order to reduce the complexity and nos of forms used throughout TBC. This will support a 'tell us once' philosophy</p>	
Upgrade to customer flow system	<p>Self service</p> <p>Improvements to meet and greet</p> <p>Reduced queues</p> <p>Reduced staff reliance on front of house</p> <p>Management of meetings</p> <p>Visitor announcements</p> <p>Promotion of events and tickets</p> <p>Book appointments</p> <p>Meeting rooms planning and management</p> <p>Barcode check in</p> <p>Self Service ticketing option</p>	<p>Quotes being obtained for new self service customer flow systems</p> <p>Trial being undertaken to manage – payments, photocopying and scanning via CSA's so customers do not have to Queue</p> <p>£10k cap (E)</p> <p>£5k ongoing (E)</p>	<b>May 15</b>	<p><b>Specification</b> for formal tender finalised published - 3 providers interested.  <b>Closing date 16 Feb</b></p> <p>Meetings with HoS held to advise from 1<sup>st</sup> April  <b>appointment based only services</b> will be offered for those walk in customers</p> <p>New system may also provide <b>digital displays</b> that have the potential to roll out to Ventura Park and</p>	£20k ongoing

				<p>allow a ticketing function to support tourism etc</p> <p><b>3<sup>rd</sup> time for tender process</b></p> <p><b>Tensator awared the contract.</b></p> <p><b>Order being raised before the contract is signed.</b></p> <p><b>Three services now offering appointment based service only. (no complaints received, increased FTR, postitive feedback from service areas re their resource) 75% reduction in officer times reported in revenues.</b></p> <p><b>Kick off meeting with Tensator 28.7.2015</b></p>	
Implementation of telephony system	<p>Self service</p> <p>Less direct dial</p> <p>Efficiencies in process</p> <p>Elimination of waste demand</p> <p>Improvements to cust serv</p> <p>Automated customer survey</p> <p>Integration with CRM system</p> <p>Reduction in call handling time</p> <p>Integration with the CRM</p>	<p>Already included in new solution under CCP.</p> <p>ICT/CS delivery project</p> <p>Resources already allocated</p>	<p>Oct 14</p> <p><b>Complete</b></p>	<p>Stage One now <b>completed</b> with difficulties during porting. A number of residual issues remain which are being managed by Daisy.</p> <p>Subsequent two stages being planned currently and will be submitted w/c 16<sup>th</sup> Feb to commence the 21</p>	£10K

				<p>day notice period for stage two.</p> <p><b>All calls directed via 709709 from 1 October will provide data capture of true demand – CRM form being built and to be migrated and ready to live in September.</b></p> <p><b>Live with new system. Benefits realisation to be measured.</b></p> <p><b>First full month (June) shows the elimination of over 2000 phone calls. Savings entered onto Covalent.</b></p>	
Transformation to self service	Channel shift E-forms for:	<p>CRM project</p> <p>£2k – video Reliance on web team/Jo Shaw and M Rahman Training needs for web team £5k to enable delivery of web forms going forward (one off payment)</p> <p>Adaptor Logic</p> <p>Ombiel product</p> <p>New PC's in the reception area and desks £3.5K ICT to move copier and scanner</p>	<p>April 2015</p> <p>December 2014</p> <p><b>Complete</b></p> <p><b>Complete</b></p>	<p><b>CRM - Training for Web team organised for Jan 26 to allow for e-form development. Completed</b></p> <p><b>- migrations have now taken place with no issues.</b></p> <p><b>- SCP Workshop was held to look at the technical problems and the future vision for CRM. Work plan prepared to go to SAB 5 March will include how Kana are performing against contract together with SCC legal update</b></p>	<p>£5K Year 1</p> <p>£10k Year 2</p>

				<p>-Form will be designed on the CRM to capture all customer contact data</p> <p><b>Safeguarding process live</b> with all <b>retrospective</b> cases logged on CRM. -process will be shared with other partners (Newcastle being the first to request it)</p> <p>CRM user training <b>delivered</b> to Rob Mitchell, Jane Hackett, Rob Barends, Andy Barratt and Stephanie Ivey on the CRM system.</p> <p><b>Automated emails</b> now generated to the customer when an enquiry is logged via the CRM giving them their interaction number.</p> <p><b>ASB processes</b> defined more clearly. Awaiting further presentation to critical friends. 51 processes identified associated with ASB throughout TBC looking to reduce to 9 generic processes</p> <p><b>The new Anti Social Behaviour Crime and Policing Act will have an impact on processes etc so the two working groups have joined.</b></p>	
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				<p><b>6 x PC's to be sited in reception. Implementation plan with resources support to be developed –</b></p> <p><b>PC's ordered waiting for delivery.</b></p> <p><b>Project Manager –</b> potential shared resource from Newcastle. AG to prep business case for approval</p> <p><b>Project manager recruited internally following a capacity building exercise within the CCP</b></p> <p><b>Project manager recruited and in place.</b></p> <p><b>PC's delivered – waiting to be deployed.</b></p> <p><b>CRM forms available via the mobile app for Council Tax processes such as – Single Person discount Move in Move out</b></p>	
Changes to our auto response and email signature	Buttons designed to provide a direct link to report it, pay it and do it....	Nil cost	<b>Complete</b>	Testing completed but to be formally rolled out and communicated to all – complete	Impact and ROI needs to be measured

				<p>Email distributed to all this week regarding <b>new auto signature</b>. ICT to then provide instructions and deployment.</p> <p><b>Web team helping with the visuals due to the icon buttons being a little fuzzy.</b></p> <p>To be rolled out w/c 27.7.2015</p>	
Restructure of CSC	Appointment of consultant to support reorg and development of competency framework Restructure and staff transferred into the CSC	£2.5K (consultant) Buy in from CMT Buy in from HOS Staff ID'd to transfer	<p><b>Complete</b></p> <p><b>Complete</b></p> <p>March 2015</p> <p><b>Complete</b></p>	<p>Report for consultant <b>finalised</b> and discussed with TG.</p> <p>Skills matrix with behavioural competences developed</p> <p>AG to work with CT and TT to measure org impact and <b>agree plan for CMT (Mar)</b></p> <p><b>JE's completed</b> on CS roles</p> <p><b>Action plan and report being drafted aligning identified resources based on demand analysis, risks and the corporate managing change guidance.</b></p>	If staff are transferred savings to be achieved from 2017

New website	To provide information, advice and service direct to the customer 24/7	<p>Ongoing development of the website is required as we progress with the development of the CRM/Self service and integration tools.</p> <ul style="list-style-type: none"> <li>• Need to promote the website</li> <li>• Establish the right skill sets to develop the site from the customer's point of view.</li> </ul>	Ongoing	<p><b>Castle website</b> launched 22 Jan. Will offer business continuity and responsiveness to service.</p> <p><b>New Intranet</b> developed to be presented to CMT 23 Feb for approval.</p> <p>CS now providing direct info to graphics team in order to improve the customer journey via the web.</p> <p><b>SOCITIM</b> web analysis report due shortly will be interesting to see how the new web performs against others more established</p> <p><b>Website being informed by customer demand – top customer enquiries received this year are being analysed by the CSC to ensure that the information is easily available on the website.</b></p>	

				<b>Customer feedback has been used to re-designed the front page based on the customers needs.</b>	
Adaptor Logic	Integration between the website/CRM and back office systems. Preventing dual data input. Ensuring processes are seamless without the intervention of an officer from the front office through to the back office. To enable the identification of marketing opportunities from corporate data.	£10k  (£5K upfront cap) £3k ongoing	May 15	Demo of 2 integration tools  Leads are John McDevitt/Rob Vernon  <b>Draft specification completed.</b> Meeting to finalise 24 <sup>th</sup> Feb and will then be passed to procurement for upload to InTend	Significant
Live chat	Web chat service to encourage and take customers to the right place on the website. Answer live interactive enquiries	£2.5k	<b>Complete</b>	Free trial to take place of a web chat system cost £45 for 2 licenses each month. Proof of concept to be established before more permanent arrangements can be procured.  <b>Product demo'd - to go live by mid-march</b>  Procurement informed  <b>Product ordered, tested and in demo environment.</b>  <b>Go live was 8.5.2015, 50% of the CSC trained on the live chat system (champions)</b>	£5k (E)



				<p><b>Staff rota'd on daily to deal with this access channel.</b></p> <p><b>See above – 120 webchats received for June.</b></p>	
New spam ware	Elimination of waste emails	<p>New spam ware being procured.</p> <p>More sophisticated products now available to eliminate waste demand.</p>	<b>Complete</b>	<p><b>New spam wear</b> (Tamemailadmin) system implemented 24<sup>th</sup> November. The quarantine and spam detection functionality is more sophisticated on the new appliance and allows the user to have more control over what is allowed through to their specific mailbox so we should hopefully be seeing a reduction in SPAM making it through to staff mailboxes.</p> <p><b>Reduction</b> in service desk calls relating to SPAM. The quarantine function also allows users to create and maintain personal 'allow' and 'block lists in addition to the system filtering out SPAM. Reduction of SPAM difficult to quantify, running SPAM reports on both systems wouldn't really prove anything as volumes of SPAM vary.</p>	ROI to be measured.

Process improvements	Cash receipting process Automated DD's Issuing bar codes to customers		<b>Complete</b>	<p>Cheque receipt process redefined. Working closely with Revs Section which will achieve savings of 30 mins per day (of CSA time). Process still to be defined. E Quiney to be consulted.</p> <p><b>Process changed, but further improvements needed.</b></p> <p><b>Automated DD</b> – ongoing dialogue with Revs – training to be implemented 27 Feb</p> <p><b>Bar codes</b> now issued by Customer Services saving 10 /15 mins per transaction (data to be supplied by end of March)</p> <p>CS now able <b>to print off bills</b> for customers = improved service to customer</p> <p><b>DD's training has taken place.</b></p> <p><b>Train system to be deployed for staff to practice.</b></p> <p><b>Go live of 1.7.2015.</b></p>	£1K (E)
Member champion	Councillor John Chesworth		<b>Complete</b>	Met with Cllr C – however, Cllr P has requested all	

Identified				<p>comms/PR re the CSS go out in his name. AG to speak to both councillors to ensure no conflict</p> <p><b>Councillor Chesworth meeting with HOCS today to run through the mobile app.</b></p> <p><b>Councillor C has given his thoughts in relation to</b></p>	
Payments to be pushed to automated services	Automated payments set up on both the payment line and website	Instruction given to staff to push to the automated payment line.	<p><b>Complete</b></p> <p><b>End of April 15</b></p>	<p>All staff now been briefed on how to promote the automated line. Already in situ on web. Stats will be available and published to KPI data.</p> <p><b>Automated</b> direct link to payment line via new telephone project – should be 1 April. <b>This went live with the new phone – there was a delay in implementation.</b></p> <p><b>Payment requests received via 709709 now pushed to the automated line.</b></p> <p><b>In June 339 calls were sent direct to the payment line without an officers intervention.</b></p>	£11k

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