1   Digital Channels (Website) Development Project

The website and other digital means should be the channel of choice for customers to access services; this will reduce costs and improve efficiencies. This should be supported by service areas viewing the website as their main delivery channel, and by the whole organisation using it as the primary means of advising customers, helping them to self-serve. This will free up more time for face to face and telephone channels to deal with more vulnerable customers.

The current website, implemented in 2008, is now out of date, much of the information is old, irrelevant, badly structured and hard to find. The website needs to be designed to the needs of the customer and to ensure a positive customer experience. When transferring services online, processes will need to be reviewed and often redesigned to align to customer need and to eliminate inefficiencies.

To deliver the project objectives, the current Content Management System (CMS) needs to be upgraded or changed. Leicestershire County Council (LCC) are procuring a new CMS and have invited us to join with them if we wish. This together with an option for sourcing a CMS for MBC only, are being considered and are subject to the outcome of the LCC procurement process scheduled to be completed by the end of March 2013.

In the meantime, we can ensure that everything is in place so that we are ready to make this change smoothly when the time comes. This means:

- testing out design, content and navigation ideas with customers on the existing website so they will be thoroughly ready for any new system;
- starting to change the culture within the organisation, and
- getting online content and services ready within service areas.

Upgrading to a new CMS system will undoubtedly provide better functionality. However in order to improve the website significantly, cultural change within the organisation is fundamental, so that officers view the web as the Channel of Choice to serve customers. Services will need to understand their customers' requirements and ensure that their needs are met online.

In the longer term (15 months +), the website should become an "online shop" for the council, where ALL enquiries and business can be conducted online, and links or integration between EDM (Enterprise Document Management), CRM (Customer Relationship Management) and backend systems provide streamlined and efficient online services. It will also provide the platform of other digital delivery channels including smart phone and tablet access, digital marketing, social media and digital TV etc.

Objectives:

- Making the website and other digital channels the channel of choice for customers accessing MBC services.
- To achieve significant cultural change within the council where online and digital is always the channel of choice for staff and customers
- To meet customers' expectations in delivering our services digitally.
- To provide a main communication tool for the council for both internal and external customers.
- To have in place all the basics for the new website ready to migrate to a new CMS when the decision around CMS provision has been made.

2   Customer Relationship Management (CRM) Development Project

The CRM is an important corporate system that can assist in improving the end to end service experiences for both customers and staff. Systematically, with the assistance of the Change team, the intention before the fire was for the majority of Council processes to be reviewed from initial customer contact right through to the delivery of the service, with a strong emphasis on "right first time". The CRM was to be used as a corporate tool aimed at recording all customer contact into the Council and thus providing Customer Services with a full picture of customer contacts and action taken by the Council.

The CRM has the ability to provide a 'portal' from the website which enables customers to transact with the Council online. Currently MBC has 3 transactions online by this method but none have had their end to end process reviewed and so do not integrate with the back office systems.

In addition, out of the 250+ services currently live on the CRM, only 6 have been reviewed which include; benefits new claims, benefits change of circumstances, ASB, development control, council tax change of address and notification of death and none of these include a full review of the end to end process. This means there is considerable scope for improving customer experiences and for delivering services more efficiently.

With increasing digital advances, more and more customers are choosing to self-serve and this can offer a huge financial benefit to the organisation, particularly if the capture and processing of data can be done as much as possible directly by the customer. In order to achieve this web forms and information need to be built in a customer-friendly manner, with the aim of Advisors also using the online channel when recording customer contact. They will then live the customer experience and will pick up on any issues or amendments much quicker. The end to end process needs to be as lean and efficient as possible so that customers get an excellent service regardless of the access channel chosen.

Objectives:

- To have a safe, effective and proportional authentication and verification process which enables customers to be identified as accurately as possible with a level of security proportional to the transaction they are trying to make
- Develop Customer Services that are recognised by residents as being outstanding, through:
  - Systems that share information so staff have visibility of all customer contact with MBC on CRM
  - Dealing with MBC will be straightforward
  - Resolution will increasingly be at the first point of contact
  - Moving towards a more pro-active approach for dealing with vulnerable people
- Secure efficiencies over the longer term against the revenue budget by focusing on:
  - Removing waste from our processes
  - Through Insight design services that are suitable for self service
  - Focusing on channel shift for appropriate services
- To have effective ways of measuring the customer experience
- To have a single view of the customer through effective Data Management and have an on-going process for reviewing the accuracy of this data, including appropriate data matching.

3   Enterprise Document Management (EDM) Project

The Council wishes to expand the use of its EDM. Currently it is only partially used in a few service areas and needs to be rolled out as a live document store for it to be fully utilised.

The EDM project is a critical project for the Transformational Programme as it interacts with CRM, CMS and eventually all of the back office systems. When customers contact the Council, using self serve or assisted service channels, it is essential that relevant documents can be accessed and viewed.

Ultimately there will be a single location for the electronic storage of all documents and all documents relevant to a customer / case will be accessible:

- From Back Office Systems or EDM where there is a business case
- In the future by our staff or customer themselves

Project Scope

The project scope is:

- To review the Council's electronic record and document management provision.
- Using our existing EDM supplier, to roll out EDM corporately across the Council
- To integrate the EDM with IDOX, Northgate and Oracle
- To integrate with CRM and CMS
- Enable relevant documents to be available to the public via Melton digital channels
- Move all files currently stored on the network into the EDM
- To upgrade to Version 10 of current EDM software
- Develop user friendly file plans and structures to drive adoption of the new system

Project Objectives

- To have an EDM that will scan all incoming post & send it electronically to the service areas
    - To measure – all post delivered electronically instead of manually
- To index documents as they arrive in the service areas and this links them to the back office systems
    - To measure - 100% accuracy in random tests checking that correct documentation is located against the right customer.
- Integrate with IDOX, Northgate and Oracle to capture all outgoing documents and emails
    - To measure – 100% accuracy in random tests checking that all documentation produced by above systems are stored within EDM
- Enable relevant planning documents to be available to the public via Melton website and supporting planning documentation to be linked and available to back office staff.
    - To measure – 100% accuracy locating public planning documents via the website and supporting documentation to be available to back office staff.
- Hold all files currently stored on the network in the EDM
    - To measure- Network drives no longer exist
- To upgrade to Version 10 of current EDM software
    - To measure – new version installed and operating
- To assist the 'council tax support service' to deliver its new service by April 2013.
    - To measure – new council tax support service digital by default

- Cost savings from freeing up of network drives (ICT to advise on extent of cashable savings)
- Improvement in no. of enquiries dealt with by CSAs as single point of contact
  - To measure- reduction in no. of calls passed to back office in order to complete
- Improvement (%) channel shift
  - To measure –increased number of transactions delivered via the web or telephone
- Improvement (%) self serve
  - To measure –increased no. of transactions delivered via the web without Customer Service intervention.
- Increased back office efficiency/capacity
  - To measure – *reduced no. of calls to back office, increased no. of cases processed and time available to focus on vulnerable people.*

4   Universal Credit Pilot Bid Project

The Welfare Reform Act which introduces Universal Credit will have the most significant changes made to the national benefit system in a generation, particularly for the working age population. Although Universal Credit is not due to be implemented for new applications until October 2013 in a staged and managed national roll out programme the Department for Work and Pensions (DWP) is carrying out a series of different pilots across the country. DWP has decided to do this due to the need to test various systems and aspects of the new proposals in order to explore the effectiveness of processes. The project will also focus upon the impact on customers of the changes so that they can influence the implementation of the Universal Credit Scheme in 2013 and staged migration of any existing claims through to 2017.

UC will be delivered as a digital by default system and is also designed to meet the general Welfare Reform changes principle of making work pay. However the DWP recognise that there will be customers who will find these changes difficult to manage for a variety of reasons and that Local Authorities (LA) are particularly well placed to be able to support these customers through those changes. Therefore the latest pilot to be announced was an LA led pilot in respect of the role that LAs can play in preparing and supporting customers through the changes and the potential for a face to face service to support those that may need the most help.

The Council has been successful in being determined as one of the 12 national Universal Credit (UC) Local Authority (LA) led Pilots and the pilot is due to run from October 2012 to October 2013.

Objectives

Within the timescales for the project we aim to

- get 50% of our existing working age benefit case load using on-line services either as self serve or supported self serve – circa around 725 customers
- understand and document the barriers faced by any benefit customers who feel they are not able to self serve or have supported self serve
- to move a number of customers that are furthest away from the job market and who are currently dependent on support toward financial independence by getting them work ready – circa around 60 customers. Out of those 60 we aim to have 20 take up employment
- understand the barriers faced by any benefit customers in gaining financial independence and document the learning from the point above
- integrate partner services wherever possible both in working from the same building and for on-line services
- re-design processes so that access for the claimant is simple whilst at the same time minimising or reducing completely opportunities for fraud and error

- accredit all of our benefit documentation and website content to ensure that it is easy to read
- ensure that our staff and partner skills are rated excellent by using Performance Management and Quality Assurance technology and an End User Accreditation Programme – we aim that ultimately all customer service advisors (21.33FTES) will achieve Northgate benefits accreditation with the initial focus being on any benefit related staff achieving the accreditation first
- skill up 10 members of our People team to be able to deal more effectively with the range of issues faced by the most complex cases, including homelessness

5   Single View of Vulnerability Project

We believe that the most vulnerable residents in the Borough are in contact with Melton Borough Council and partner agencies a disproportionate amount of times as a result of their multiple service needs. This places a high level of cost on public sector agencies, particularly as sole service solutions are not necessarily tackling the wider needs of individuals, which results in repeat contacts with customers. There is therefore a requirement for MBC and partners to understand the wider needs of our customers to ensure that those who are vulnerable have access to the right services in a way which meets their needs holistically. To achieve this requires moving toward a preventative model of working where multi-agency data and insight can help identify the wider issues of customers at an earlier stage.

This project is not focussed on knowing everything about all customers rather identifying those who would benefit from a more joined up service that goes beyond a single service response. Currently how individuals are identified as vulnerable varies and is dependent on solid partnership working and information sharing between agencies. This approach means people are not necessarily identified as vulnerable until various issues arise where it becomes clear other agencies are involved, it is reactive rather than preventative. Customer information is stored in numerous ways across multiple systems and requires a manual gathering of information in order to achieve a single view of customers and their potential vulnerability. Furthermore circumstances change which can mean a person who isn't vulnerable today maybe vulnerable tomorrow and thus there is a business case to join up service knowledge to help understand the trigger points to vulnerability.

The project is broken down into two parts. **Part One** (Pilot) will focus on 'proof of concept' and testing the benefits of having customer insight, multi-agency information and interaction data on a small cohort of customers. This will involve:

- Identifying a suitable customer cohort for analysis.
- Carrying out insight to understand customer service interactions across multiple agencies.
- Carrying out insight to understand potential service trigger points of customers who are vulnerable.
- Understanding customer experiences and Identifying whether alternative solutions/services at an earlier contact would have reduced further contact.

Implementation of **Part Two** of the project is dependant on the outcomes achieved through phase one. The pilot will aim to generate enough learning to help inform whether the implementation of a multi-agency help desk, or similar process, can help to reduce customer vulnerability and prevent multiple contacts arising. We believe this approach can be achieved by developing a system which incorporates a combination of customer insight, multi-agency data and service data about

customers. This would allow MBC to understand, at point of contact, whether potential vulnerability exists with customers, assigning a risk score based on previous interactions and presenting issues. This would act as a flagging system which would enable MBC to adopt a differing service response to an individual, providing a more holistic package of support depending on the score assigned. If implemented (phase two) it is believed this will help:

- Vulnerable individuals access the 'right services' at the 'right time'.
- Melton Borough Council to offer potential vulnerable customers wider services/options at first point of contact, based on customer profiles.
- Identify and address broader vulnerability at contact (Face to face, phone, email, online).
- Move away from incident management towards understanding risk and triggers.
- Shape our services and our service response around customer needs and profiles.
- Achieve a cultural shift focussed on tackling root causes.
- Reduce repeat customer contacts, identify efficiencies and create savings.
- Reduced customer chase up contacts.

6   Social Fund Implementation Project

The Social Fund administered by the Department for Work and Pensions to support those in financial hardship is to be abolished in April 2013. The support offered under the Social Fund (Community Care Grants and Crisis Loans) will be replaced by new arrangements administered by top tier Authorities, with Leicestershire County Council responsible for delivery from April 2013.

Authorities are not required to replicate previous provision which has therefore provided an opportunity for LCC to redefine how the new provision can best be delivered effectively.

LCC have proposed that District Councils lead on administering the new model on behalf of LCC from April 2013 due to their experience in administering similar services and their access to wider support services which can provide additional benefit to the scheme.

Objectives

- To implement and administer a replacement scheme for the Social Fund by April 2013.
- To develop a provision which supports the most vulnerable people in Melton.
- To develop a model which provides a wrap around service that tackles the causes of financial hardship.
- To reduce the number of people who are affected by financial hardship in Melton.

7   Review of Local Government Funding (Including Council Tax Support Service Implementation) Project

The 2010 Spending Review announced that the Government would replace Council Tax Benefit through Localising Support for Council Tax (LCTS) from 2013-14, reducing current expenditure on Council Tax Benefit by 10%. This reform is part of a wider policy of decentralisation, giving Councils increased financial autonomy. The Local Government Finance Bill was introduced to

parliament on 19 December 2011. This Bill imposes a duty on billing authorities to make a localised scheme by 31 January 2013 and to consult with major precepting authorities and other interested parties.

The Government will allocate funding to billing and major precepting authorities to support the provision of the localised scheme.

The Government is also proposing changes to Council Tax and Business Rates. The changes to Council Tax will give Local Authorities the discretion to change exemptions in relation to empty properties to raise additional Council Tax. The Council has to approve a Localised CTS by 31 January 2013 or the default scheme will be imposed on MBC with an additional loss in revenue.

Objectives

- Scheme is approved by 31 January 2013
- Providing the LGF bill has become an Act the scheme is approved on 12 December 2012
- A further 4 week consultation takes place following the decision of full Council
- The scheme is effectively communicated to those affected and they are given the opportunity to 'digitally' sign-up to the scheme
- Testing on the new scheme is undertaken successfully
- An Equalities Impact Assessment is completed by time of full Council decision
- A Discretionary Fund scheme is introduced by 31/03/13
- Transfer of CTB data to CTS
- Annual Council Tax Bills with correct CTS discount are sent by 13/03/13

The scheme also provides the opportunity to link with the Universal Credit Pilot and support CTS claimants to move to using digital services. Although the scheme can be introduced without the need to do this, there are a number of opportunities provided by working on this scheme and in partnership with other projects to:

- Revisit and improve current processes
- Improve the communication provided to staff and in turn to our customers
- Work in partnership with Northgate to access online services that they currently provide –e.g. ebenefits; erevenues; eservices
- Improve the website and overall service to customers to enable them to make an application online, report changes of circumstances online, integrate with the back-office to reduce time and save costs
- Provide improved information/access to 3rd party representatives of affected customers
- Work in partnership across the County
- Work with organisations supporting vulnerable people