

Demand Management

Interim Report – September 2018

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Brief context

The aims and objectives for the demand management project were set out in the paper that went to the Policy Finance & Administration Committee meeting on 6th February 2017. These were:

Aim

To achieve savings through effective demand management

Objectives

- To develop our approach to achieving on-going reductions in demand, particularly through active case management and rethinking how MBC systems all work together.
- To demonstrate that active intervention promotes independence, reduces contact and consequently saves money for Melton Borough Council (MBC).
- To ensure that demonstrable successful ways of working can be sustained over the longer term

The paper also set out primary and secondary outcomes for the project:

Primary Outcomes

- A clear understanding of the costs and benefits of pro-active intervention involving active case-management
- Reduced customer contact (measured in contacts per customer)
- Greater independence for people following intervention
- Establish the long-term sustainability for the Me and My Learning and pro-active customer service approach
- Adoption of a “whole system” design approach and capturing efficiencies to ensure that re-engineered processes are as affective as possible.

Secondary outcomes

- Understanding of the interaction (or lack of) between MBC IT systems
- An opportunity to demonstrate the value of adopting a “Melton Dashboard” approach to data collection, use and presentation.

Analysis

A wide range of analysis has been completed using MBC data (see appendix 1 for details). In many cases this analysis has not been straightforward to complete (see page 5 “Issues identified” for more information). However, it is unlikely that further large scale analysis will need to be completed given the findings made.

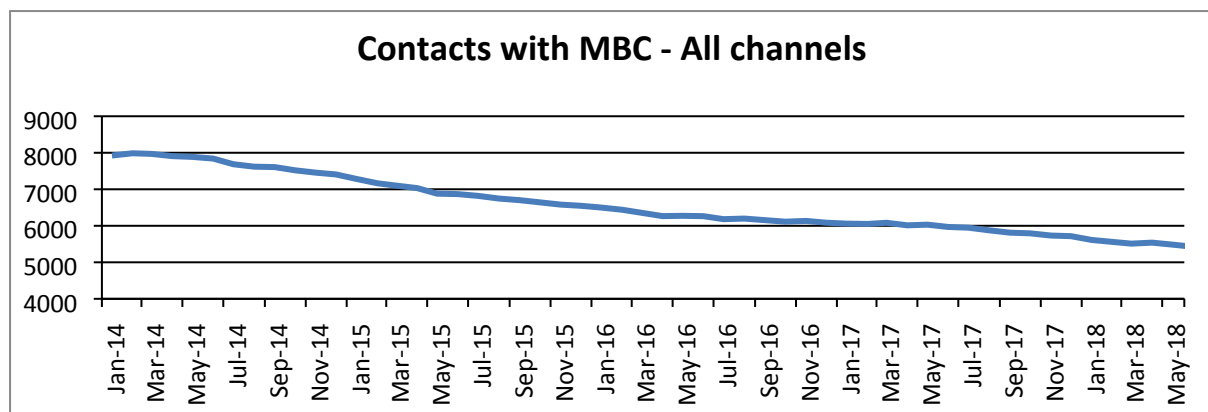
What does the analysis tell us?

The analysis has shown that nearly all of the people who contact MBC frequently are MBC tenants (94% of the Top 100 contacts in 2016/17 and 81% of the “next 100” contacts in 2016/17). Further analysis showed that a significant majority (63% in 2016/17 and 51% in 2017/18) live in priority neighbourhoods.

However, it is difficult to draw firm conclusions about why people contact MBC. Analysis of the Top 100 callers in 2016/17 showed that there was an average of 44 contacts per person, but 80% of the calls fell within one of nine categories (from a range of 50+). However, in each category a small number of callers accounted for the bulk of the calls.

It might be assumed that with the majority of calls from the Top 100 callers coming from MBC tenants and a significant proportion of those people living in priority neighbourhoods that there would be some common reasons for the calls – perhaps related to the area/environment. However, analysis revealed no clear links between the callers address and the reasons for the calls, which would suggest that calls were more linked to personal issues rather than place issues.

The overall number of contacts with MBC continues to reduce – see below.



Analysis looking at those people that appear in the Top 100 list for more than one year (persistent frequent callers) showed no particular patterns for the reasons for their calls. However, looking in more detail at a small number of these cases showed that nearly half of the callers made a significant proportion of their contacts in person (face-to-face). This frequency of face-to-face contact is supported by analysis of the Top 100 callers in 2017-18 which shows that 85 of the 100 called at Parkside at some point in the year and that they called an average of 7 times per person.

Linked to above, analysis of the Top 100 callers in 2017-18 showed that only 2.3% of contacts came via email or the internet. However, analysis of the Top 100 callers in 2016-17 showed that 56% had internet access.

Analysis has also shown that the number of people who contact MBC twenty or more times in a given year has fallen year on year, from 497 people in 2013/14 to 245 people in 2017/18.

It might be assumed that the majority of those who contact MBC regularly are either not working or over pension age. However, analysis of the Top 100 callers in 2016-17 shows that only 8% were over pension age. Nearly a quarter (22%) of households contained someone who was working full time and 28% of households contained someone who was working part time.

Detailed analysis of the Top 100 callers in 2016-17 showed that just over half (55%) had debts to MBC (either rent or Council Tax) totalling (at the time of the analysis) £77,422.22.

Prompted by rising rent arrears, analysis was undertaken of the impact on rent arrears of people moving onto Universal Credit (UC). The analysis confirmed a significant impact on rent payments (and where relevant, any arrears position) of a move to UC. The analysis enabled a greater understanding of the impact and facilitated detailed discussions with DWP in order to minimise the impacts.

The demand management project specification asked for 50 of the Top 100 callers in 2016-17 to be referred to Me and My Learning (MML) for potential support with a view to increasing independence. However, despite strenuous efforts by MML mentors it proved extremely difficult to engage with these people. These findings supported an earlier attempt to make pro-active contact with people receiving high

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levels of Council Tax Support which also found very low levels of engagement. This shows how important it is to take advantage of the contacts when they are made and make every contact count.

Analysis shows that there is value in the support provided by MML – particularly when people move into work and also through the digital support that is available.

One of the aims of the demand management project, as set out in the specification, was to establish if there were any links between the Top 100 callers and the top 20 Council Tax debtors (those who had the highest debt levels). Analysis showed that

there were no links and that Council Tax debtors form a very different cohort from those who contact MBC regularly.

Analysis of the Top 20 Council Tax debtors showed that much of the debt had built up over a number of years. It should be noted that this is in the context of overall levels of debt being in a good comparable position with other councils.

Analysis of the Council Tax debtors reminder process showed that, on the face of it, it does not appear to be as efficient as it could be with large numbers of reminders being issued that appear to generate little by way of a response. Again, this can tend to be a standard approach across councils so we might need to look at new approaches to this in the future.

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Issues identified

As stated earlier, the majority of the analysis carried out to date has been far from straightforward to complete. To date the demand management project has identified a number of issues relating to computer (IT) systems and data collection and use. These issues include:

- Too many different IT systems that don't talk to each other
- Consequently, there is no single picture of people meaning that, for example, connections are not made and issues not identified
- The current CRM system doesn't link callers from the same address or identify misspellings
- There are no consistent data protocols (e.g. title, surname, first name, address) therefore information from different systems cannot easily be aggregated or analysed
- The current website and self serve options aren't as good as they could be (poor feedback, not always easy to navigate, process failures etc)
- There is little or no system expertise in-house and consequently we can't be sure systems are operating well and opportunities are being seized
- Poor data collection (e.g. tenancy information, details of CS Seniors activity, website activity etc)
- Use of spreadsheets to collect data/manage activity. This makes subsequent information gathering more difficult/labour intensive than it should be
- There is a general lack of understanding of the value of data and/or the bigger picture (why we need to collect data, how to use it and what it might show us_

- There is a need to focus on outcomes (and impacts) and have a clear picture (understood and bought-into by everyone) of what we are trying to achieve
- No-one seems to know what information is held where – no-one has the “big picture”
- No clarity around roles – CS Seniors and MML, but also around website and self-serve activity, reporting and ownership.

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Impacts on the demand management project

One of the aims of the demand management project was to establish which MBC initiatives are the most effective at reducing demand.

Despite extensive efforts it has proven to be extremely difficult to effectively demonstrate both which initiatives are most effective at reducing demand and those, such as MML, that provide value for money. This is primarily because of a lack of suitable data (which in the case of MML has been exacerbated by the delivery of external contracts that require the use of external systems, not owned by MBC that we are then unable to interrogate).

However, whilst the data issues mean that we cannot be clear which of the actions taken by MBC to date (the move away from a silo based approach to focusing services on the customer), it does seem reasonable to conclude that those actions (and those currently being consolidated around the People and Communities Directorate since the project started), focusing on a pro-active case management approach where appropriate have had a positive impact as the rolling average of callers continues a downward trend as does the number of people who have contacted MBC twenty or more times in a given year.

Consequently the focus for the project now needs to shift towards addressing the issues that have been identified in line with the following recommendations.

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Recommendations

To date the demand management project has provided a great deal of insight into the people who contact MBC and use MBC services. The project has also highlighted a number of issues that, if addressed, will significantly improve data

collection, use and understanding. This will underpin activity and enable pro-active interventions to be identified and the effectiveness of activity to be demonstrated and kept under review.

Based on the demand management project's findings to date the following recommendations set out the actions that need to be taken:

1. Improved data collection

Initially a review should be undertaken to establish a clear picture of the data that is held, where it is held and in what format and this will feed into the systems work identified as a key project in the Council's new Corporate Delivery Plan. This should be followed by a review of data requirements – what needs to be captured and why, along with where the information is to be stored and collated.

2. Data education

Work to ensure that people understand the value of data – why is it collected? What can it tell us? How could/should we use it? How will it help me to do my job better?

3. Updated IT systems

As stated above, in the short term, all findings from the demand management project are to be fed into activity focusing on IT system updates, upgrades and replacements. Efforts should be made to implement data protocols wherever possible to facilitate better data analysis. In the longer term IT systems should enable a “single picture” of an individual to be available and, where possible, the number of different systems should be reduced to a minimum.

4. Website and self-serve improvements

In the short term work should be undertaken to review and update web content and ensure that self-serve options are working as effectively as possible. Currently there is no clarity around ownership and maintenance of self-serve processes, website activity, reporting and analysis. Clear lines of responsibility and accountability need to be established. In the longer term a new website and self-serve options should be implemented drawing on the experience of the best available sites.

5. Promoting greater channel shift

Linked to the above recommendation, analysis shows that whilst people have internet access they do not choose to use this as a means of contacting MBC.

Action should be undertaken to understand why this is the case and to actively promote a shift to on-line and self-serve activity.

6. Greater expertise

Introduce lead officers (system administrators) for each IT system to ensure that each system is operating correctly and effectively and that development opportunities are seized.

7. Tenant focus

Analysis shows that the majority of frequent callers are MBC tenants. Whilst there was no clear evidence to link the reasons for people's contacts to their tenancies action should be taken to explore whether MBC needs to provide greater support to tenants.

8. Neighbourhood focus

With the analysis showing that a high proportion of the people who contact MBC regularly live in priority neighbourhoods, opportunities to work directly within these neighbourhoods and adopting a neighbourhood focus should be explored.

9. Making every contact count

Analysis showed that a significant proportion of persistent callers contacted MBC face-to-face. This might suggest that these are more complex cases and a face-to-face contact could provide an ideal opportunity to engage people to offer more support (we know from other work that if we approach people the chances of engagement are extremely low). The analysis also showed that a significant proportion of the frequent callers had debts with MBC. Their contact could provide an opportunity to engage and begin to address the debts. Action should therefore be taken to explore how best to make every contact with MBC count – how best to seize opportunities.

10. Don't simply focus on those not in work

The introduction of UC sees an increase in the number of people receiving benefits, including those that are in work. The analysis also shows that many of the frequent callers live in a household where someone is working. Therefore, efforts must be made to ensure that services are available to those in work as well as those out of work.

11. Tackle Council Tax debt early

Those owing the greatest amount of Council Tax have seen their debt accrue over a number of years. Action should be taken to ensure that Council Tax debt is tackled at the earliest opportunity.

Appendix 1

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Analysis completed:

- Top 100 Callers 2016-17 + updates in October 2017
- Top 100 Callers 2016-17 – reasons for contacting MBC
- Top 100 Callers 2016-17 – distribution of contacts (by month)
- “Next 100” callers in 2016-17
- Priority neighbourhoods
- Payment Portal usage
- Top 20 Council Tax Debtors
- People who made 2 contacts during 2016-17
- Universal Credit and the impact on rent arrears
- Council Tax Debtors – Analysis of the effectiveness of reminders, final notices, summonses and liability orders
- Selected Top 100 cases referred to Me and My Learning (MML)
- Council Tax Debtors
- Top 100 Callers in 2017-18
- Top 100 callers January to May 2018 inc.
- People MML supported into work during 2016-17
- Top 100 callers – people who appear in more than one years’ lists
- Contacts with MBC – the bigger picture
- Emails received by MBC
- My Account and Self-serve activity
- Tenancies
- People supported into work by MML in 2014-15.

Other analytical activity:

- Produced Melton Place Scorecard
- Updated “rolling average” record of contacts with MBC.