

<b>SUBJECT:</b>	<b>JOINT WORKING ANNUAL REPORT 2017</b>
<b>REPORT OF:</b>	<b>Officer Management Team – Chief Executive</b>
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## 1. Introduction

This is the fifth Annual report of the joint working between the two Councils. It describes the achievements of the last year and describes the key features of the planned joint working in the coming year.

## 2. Progress over the last year

### Service Reviews

- 2.1 In the last year the Councils completed their programme of shared service reviews, with the agreement to create shared services for Planning and for Local Land Charges. In total over the period 20 shared service business cases have been approved, which when combined with the initial savings from combining senior management has resulted in savings of £1.9m, or 10% of the original budgets. All staff are now on harmonised terms and conditions. A case study of the shared services review phase of the joint working has been produced.
- 2.2 The implementation of the Planning shared service is the most complex of all the shared services and comprises a number of workstreams.
- Establishing a single shared staffing structure
  - Co-locating staff in the Amersham offices
  - Combining the two separate Planning databases and applications into a single application
  - Reducing the volume of historic planning data held outside of the Uniform database and document management system.
  - Reviewing processes and procedures to create a harmonised and more efficient operation, and increase income generation.
  - Creating a single culture which is outcome focused to a delivery high quality customer focused service.
- 2.3 The single staffing structure came into effect in October, and the staff moves required to co-locate the service will be completed by early December. The joint together of the two Planning systems is a complex project but is scheduled to complete by Summer 2018. Once the staffing changes and office moves have been completed the work of reviewing processes will commence.

## **Chiltern and South Bucks Joint Committee - 7<sup>th</sup> November 2017**

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- 2.4 Local Land Charges will be brought together as a single team at the beginning of 2018. The main benefits will come from the introduction of a fully electronic LLC register and search service at both Councils once the project to bring Planning application and historic Planning data together into the unified database is completed.

### **Other Joint Working Initiatives**

- 2.5 During the year the authorities have continued to work together to produce a joint Local Plan, and in the process have secured a Memorandum of Understanding with Aylesbury Vale regarding meeting unmet needs.
- 2.6 In the last year the Councils have put their shared service teams forward for a number of national awards. The Revenues & Benefits team was highly commended in the two categories they entered. The joint Waste team managing services for CDC, SBDC & WDC was shortlisted as a finalist as best team of the year at the national awards. The Environmental Health team was nominated for a CIEH Excellence Award (2<sup>nd</sup> November). Officers from Healthy Communities also completed a 2.5M DECC sponsored home energy efficiency project securing affordable warmth to 629 households across partnership involving 14 authorities. The project delivery was awarded Highly Commended in the LGA awards.

### **3. Stronger in Partnership**

- 3.1 In February 2016 the Councils agreed to move to the next phase of their joint working which is referred to as "Stronger in Partnership". This is a more transformational phase of joint working, and will take the two Councils' objectives and set out to deliver these through:
- Creating a single culture and identity for all staff based around being the delivery vehicle for services to the two sovereign Councils
  - Creating a workforce that works in different ways, is digitally agile, customer focussed and has a culture of continuous improvement.
- 3.2 During the last year this transformational phase has been progressed by four main work streams.
- Introduction of mobile and flexible working in a number of teams.
  - Office reconfiguration aligned with reducing physical storage and moving towards a clear desk policy.
  - Developing the single organisational culture.

**Chiltern and South Bucks Joint Committee - 7<sup>th</sup> November 2017**

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- Commencing on a customer experience programme to reshape the organisations approach to meeting customer needs.
- 3.3 **Mobile and flexible working.** This work stream sets out to allow teams to work in a way that means they are less reliant on a particular office base, and where it helps service delivery to operate in a mobile fashion around the districts accessing key service applications remotely. Initially it has been introduced in Building Control, Human Resources, and Legal Services.
- 3.4 The project has involved the deployment of virtual desktop technology, and where relevant (e.g. Building Control) mobile apps which are part of core applications. The project has led service teams to reduce their non-electronic storage, and for Building Control the service operates now in a paperless way.
- 3.5 As important as the technology to support mobile working is adapting team culture to the new way of working. This has been achieved by the teams participating in workshop discussion to agree what changes they need to make to their processes, how they interact as a team, and how management and performance monitoring will work.
- 3.6 Over the next eighteen months the mobile and flexible working will be introduced as appropriate to the whole of the organisation. In areas such as Revenue & Benefits and Customer Services this will include the scenario of full time home working. The Mobile Working programme timelines are shown in Appendix 1
- 3.7 **Office Reconfiguration.** The transformational changes embarked upon will have an impact on the organisation's office requirements. For example moving to mobile working with reduced physical storage needs reduces space needs, but also increases the need for flexible workspaces (i.e hot desking).
- 3.8 In 2017, as part of considering office space requirements, the decision was taken to vacate one of the office buildings on the Capswood site. The office moves required to enable this provided the catalyst to revise the whole office layout over both the Capswood and Amersham sites, and to introduce facilities move appropriate for the new ways of working, e.g. hot desks, more informal meeting spaces). All these changes will be completed by the end of 2017.
- 3.9 **Single Organisation Culture.** Cultural change is a key element of the Stronger in Partnership programme. During the last year significant staff resource has been applied to:
- Agree a set of values and behaviours for the organisation that were developed by the staff and managers (Appendix 3).
  - Developing positive unwritten groundrules (UGRs) to translate the agreed values and behaviours into the way teams work. The focus has been on teams developing these for themselves. It has also involved the sharing of good ideas and approaches between team as part of creating a more single organisation culture.

**Chiltern and South Bucks Joint Committee - 7<sup>th</sup> November 2017**

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- Publishing a Leadership and Management Charter which sets out what staff can expect from their managers in terms of values and behaviours

3.10 As part of the Councils' Organisational Development Strategy it is recognised that middle managers are key to the success of the transformation programme. They need to be supported and developed to enable them to succeed with the challenges they will face. Part of the support put in place is the setting up of a Middle Management Development Programme that commenced in 2017 and will be part of the organisations training delivery going forward. The programme uses techniques such as active learning to help develop managers' skills and competencies. . It provides participants with a level of technical knowledge and management competence that is recognised by the Institute of Learning and Management and it promotes consistency of management approach across the Councils.

3.11 **Customer Experience Strategy.** This is the most transformational of the four areas of the overall programme. Chiltern District Council and South Bucks District Council agreed a Joint Customer Experience Strategy in April 2017, the strategic principles of which were:

- Understand customer needs and use customer insight to develop services;
- Provide a consistent customer experience;
- Deal with the whole enquiry at first point of contact where possible;
- Provide an accessible service promoting self-service;
- Providing a quality service aiming for right first time.

3.12 The first stage in delivering the strategy was to develop an outline business case which was done with external support, from an organisation experienced in this field of work with local authorities, 4OC. The outline business case was considered by the Joint Committee in November 2017, with the intention to progress to a full business case with the aim of commencing implementation in Spring 2018.

3.13 Appendix 2 describes in outline the key elements in the approach to delivering the Customer Experience Strategy. The Strategy in addition to promoting channel shift and improving the experience of customers when dealing with the Councils, is expected to deliver in excess of £0.5m savings with a pay back on investment of less than three years.

**4. Risks**

4.1 Any programme of the scale and complexity of the joint working between the Councils will have a number of risks that need to be managed. At a strategic level the key risks to keep under review are shown below.

	<b>Risk Description</b>	<b>Risk Trigger</b>	<b>Risk Mitigation</b>
1	The Councils do not have the skills and capacity to deliver	Increased reliance on external support to deliver change.	Identify any skill or capacity issues.

Chiltern and South Bucks Joint Committee - 7<sup>th</sup> November 2017

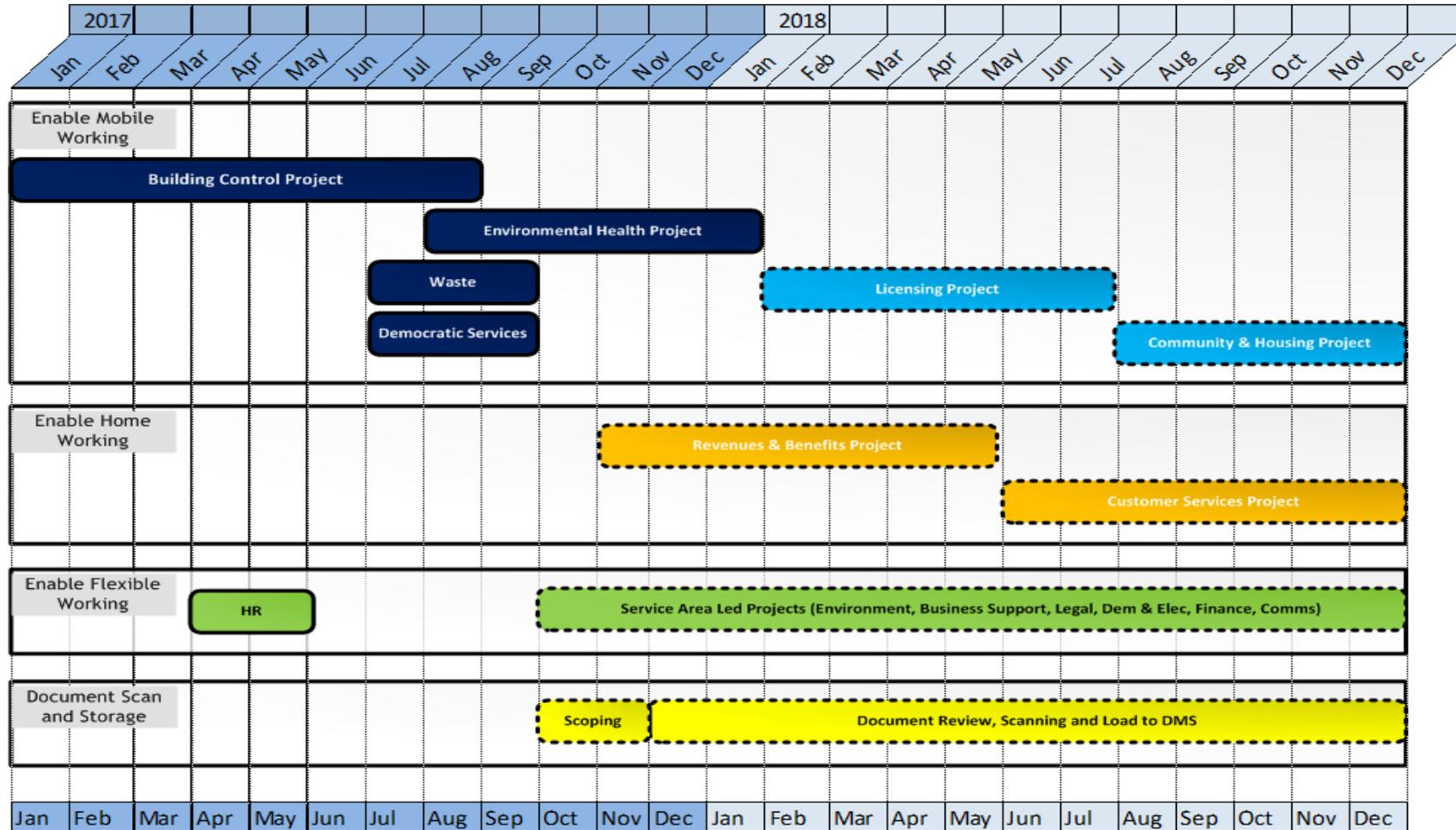
	<b>Risk Description</b>	<b>Risk Trigger</b>	<b>Risk Mitigation</b>
	changes required.	Project timescales extend, benefits not achieved. Ways or working and culture do not change	Organisational Development programme to support senior and middle managers Develop an approach to managing cultural change within the Councils. Prioritise workloads for senior staff
2	Failure to put in place a single culture appropriate for the way the Councils want to work.	Changes fail to happen, and investment in technology does not yield full benefits. Disjointed workforce with impact on morale	Involve all staff in developing values and behaviours of the new organisation. Allow time for changes to be bedded in, avoid as far as possible top down direction on all matters. Highlight successful changes and the benefits arising.
3	Staff are not adequately engaged or communicated with which inhibits change.	Detrimental effect on delivery. Officers do not know what the Councils are trying to achieve or why. Managers are unclear on the communications messages they should give their staff. Poor staff relations Impact on staff morale	Communication plan in place for staff to clear explain why change is happening and the intended benefits. Regular meetings with Staff representatives Honest and clear communications

#### 4. Summary

- 4.1 The report shows the scale and scope of the work undertaken by the programme over the last year, and what has been achieved so far. Change has been occurring that has affected to varying degrees all parts of the Councils. The partnership has now commenced a phase of the joint working that is more complex and challenging, and will require commitment and perseverance from officers and members. It is also expected to deliver financial benefits to contribute to the two authorities' Medium Term Financial Strategies.

<b>Officer Contact:</b>	<b>Bob Smith Chief Executive</b>
<b>Background Papers:</b>	<b>None</b>

MOBILE WORKING PROGRAMME



## CUSTOMER EXPERIENCE STRATEGY

### 1. The Customer Experience Vision

1.1 The Customer Experience Strategy practically mean for our customers, Customer Services, our service areas and our Councillors the following.

#### ▪ **Customer**

- Each customer will have their own **Customer Account**, accessible at any time from any device.
- On logging in they will see **information** pertinent to them, such as:
  - Next waste collection date;
  - Their Council Tax bill and payments due;
  - Any planning applications in their neighbourhood;
  - Their local councillor's details.
- If a customer wants to **report an issue** they can do so on a smart webform. This will display any existing incidents that have already been reported on a map view.
  - If the issue is already reported they can sign up for an alert when the incident has been resolved.
  - If it has not previously been reported they can complete a webform and attach a photo. They will immediately be given a reference number and a time frame in which it will be dealt with. They will receive updates until the incident is cleared.
- If a customer wants to **make an application** (e.g. Housing Benefit) they can do so online using a webform.
  - The form will validate the information entered, allow them to save progress and return later and allow evidence and documents to be uploaded.
  - Once application submitted the customer will be alerted and given timescales.
- Receive **proactive communications** and notifications from the Councils.

#### ▪ **Customer Services**

- **One system** where they can see all interactions with the Customer – reducing the time that it takes to be multi-skilled.
- **No double handling of information** – they will use the same forms as the customer to report an issue raised via telephone or face to face and these forms will integrate straight in to back office systems.
- Access to **status updates** and therefore be able to update customers on the progress of their request
- Become **data rich** enabling analysis so that services can be better tailored to meet customer need.

▪ **Services**

- Receive **validated and complete information** directly into back office system from Customer or Customer Services
- Receive **consistent and structured information** across all contact channels
- **Reduce follow up and chasing** progress contact as customers have automatic status updates
- Receive **less duplicated requests** as better information available at first point of contact
- Reduce **double handling** through integration.

▪ **Councillors**

- Have their own **Councillor Account** that will allow them to raise requests on behalf of residents, view when the request will be completed and its current status
- Be able to **see all reported incidents** in line with data protection legislation in their ward.
- **Requests sent directly** to the correct service team and in to the back office system
- Receive **proactive notifications** to see an update on progress
- By being able to view all reported incidents be able to carry out evidential **engagement with residents**, businesses and the Council.

## 2. Target Operating Model

2.1 The Target Operating Model (TOM) to be used is based on full centralisation and transformation of customer interactions. This will build upon work already undertaken to in a number of areas to consolidate contact and will align clearly to the principles of the Customer Experience Strategy, yield improved customer experience outcomes, deliver efficiencies through improved ways of working and ensure flexibility to enable other services or delivery on behalf of other organisations to be incorporated.

## 3. Target Customer Journey

3.1 The customer journey can be defined as the customers' experience of the Council and the service received from initial contact through to service delivery. Four key functional customer journeys were established which cover all services offered:

- Report it – where a customer wants to report an issue (e.g. missed bin)
- Pay for it – where a customer wants to pay for a service (e.g. Council Tax)
- Request it – where a customer wants to request a service (e.g. bulky waste collection)
- Apply for it – where a customer wants to apply for a service (e.g. licensing application)

3.2 For each of these customer journeys Customer Services will play a key role in the initial contact and can provide either:

## Chiltern and South Bucks Joint Committee - 7<sup>th</sup> November 2017

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- Level 1 – Signpost – pointing the customer to the appropriate digital offer, team or partner;
- Level 2 – Partial Triage – Customer Services capture information at first point of contact but the service area then needs to contact the customer again to get further information in order to fulfil the request;
- Level 3 – Full Triage – Customer Services can capture all information at first point of contact and send a request to the service area so that they can fulfil without further contact with the resident;
- Level 4 – Fulfilment – Customer Services fulfil (complete the service) at first point of contact.

3.3 The aim is for Customer Services to undertake as much fulfilment as possible across all four functional journeys and it is envisaged that fulfilment will be completed in all cases where the customer wants to 'Pay for It' and 'Request It'. In most cases fulfilment will be completed where the customer wants to 'Apply for It' or 'Report It' but it is appreciated that in some cases fulfilment will be completed by the service area with Customer Services carrying out full triage.

### 4. Solution Architecture

4.1 There are three key outcomes required from technology to deliver the Customer Experience Strategy and support the target operating model. These are:

- **The ability to manage the customer:**
  - Providing a single view of the customer showing all interactions with the Council in one place;
  - Share their information and documentation across services;
  - Set expectations through the provision of Service Level Agreements (SLAs);
  - Provide service updates increasing transparency;
  - Proactively pushing information to reduce avoidable contact.
- **The ability to streamline the recording of information:**
  - Capturing contact once and capturing it consistently across all channels;
  - Removing double or triple handling into systems, databases or spreadsheets;
  - Integrating contacts into service area systems, enabling service to fulfil the request without the need for further contact to the customer.
- **The ability to support systems in a simple way:**
  - Consolidating systems and suppliers as far as possible;
  - Using hosted solutions where appropriate, with robust backed off commercials with the supplier;
  - Using technology that is simple to edit and change during 'Business as Usual' by less technical staff;
  - Ensuring data security compliance and regulations (such as GDPR) are built in to the technology from the outset.

**Chiltern and South Bucks Joint Committee - 7<sup>th</sup> November 2017**

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4.2 A number of technology components are required and ideally these will be from the same supplier. These are summarised below and will be subject to a detailed requirements exercise during the Full Business Case stage.

- **Customer Account** – Customer Account for all service areas allowing customer to report incidents, apply for services, receive status updates, view an account summary and view proactive information. The account will be configurable to allow the Councils to allow further services at minimal cost.
- **CRM Lite** – Allows Customer Services to raise service requests on behalf of customers. Mirrors the Customer Account so that the same level of service can be provided through telephony, face to face and on line channels. Same database as Customer Account so that there is only one customer record.
- **Webform Tool** – Allows the Council to develop intelligent webforms that will feature on the website, customer account and CRM Lite. Act as a script for Customer services staff. Webforms should seamlessly align to corporate branding and integrate with the Customer Account, CRM Lite, payment system and maps. Would involve replacing the different webform packages used by the Council with a single fit for purpose application that integrates fully with the Councils' website application.
- **Integration Engine** – Sends requests raised to service area systems, creating a service request or task for the service areas to fulfil. When the work is completed a status update is sent back via the integration engine to the Customer Account. Integration engine will also push information to the Customer Account. Ongoing changes should be made in house.
- **Push Notification** – Allows the Council to send information and communication to customers that have signed up to the Customer Account. Information should be able to be sent by geography and by service. These can also be used for emergency planning and by partners for general communication.

## VALUES & BEHAVIOURS



### COURTEOUS

Around here we all:

- take time to listen, understand and respect others
- are helpful and fair, always considering the impact of our behaviour and showing empathy
- act with integrity and professionalism
- are open and honest, and encourage others to be the same
- encourage inclusivity, valuing diversity and equality



### COMMITTED

Around here we all:

- are motivated to deliver the best possible service, working towards delivering the most appropriate outcome
- are committed to increasing and sharing knowledge
- gain job satisfaction from achieving our very best in the services we deliver
- aim to get things right first time, taking proactive ownership of tasks
- are committed to continuous improvement and development

### CUSTOMER FOCUSED

- Provide a consistent, professional fair and honest service in all our dealing with customers
- Consider the impact of all our actions and decisions on our customers
- Deliver an easy accessible, reliable, efficient and flexible service
- Aim to accurately resolve all enquiries at the first point of contact, taking ownership of the enquiry and ensuring that it is fully resolved to the customers' satisfaction
- Take the time to understand our customer needs

### CHALLENGING

Around here we all:

- look for better ways of working, being open to and adaptable to change, flexible and supportive of others
- focus on finding the most appropriate and affordable solution
- are commercially minded, balancing customer expectation, risks and financial impact
- take ownership of our decisions and think about the wider implications for the team and the Councils
- actively work towards meeting and exceeding set targets, whilst managing expectations



### COLLABORATIVE

Around here we all:

- work jointly with others to be positive and inclusive for the mutual benefit of our customers
- contribute to ensuring a harmonious and enjoyable working environment
- communicate with others, share information, expertise and ideas
- have a can do attitude, helping others to the best of our capabilities, even if it is not part of our role
- actively support our Councils joined up approach, working to achieve our common goals

