



Customer Services and Business Support Policy Advisory Group

Monday, 16 September 2019 at 6.00 pm

Room 6 - Capswood, Oxford Road, Denham

A G E N D A

This Policy Advisory Group meeting is not open to the public

Item

1. Evacuation Procedure
2. Apologies for Absence
3. Minutes (*Pages 3 - 6*)

To approve the minutes of the Customer Services and Business Support PAG held on 11 June 2019.

4. Declarations of Interest
5. Windows 10 Roll out update

A verbal update and presentation.

6. Customer Experience Programme Update (*Pages 7 - 14*)
7. Write off Report for the 2018/2019 financial year (*Pages 15 - 18*)

Note: All reports will be updated orally at the meeting if appropriate and may be supplemented by additional reports at the Chairman's discretion.

**Membership: Customer Services and Business Support Policy
Advisory Group**

Councillors: D Smith (Chairman)
M Bezzant
T Egleton
D Saunders

Date of next meeting – Thursday, 30 January 2020

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CUSTOMER SERVICES AND BUSINESS SUPPORT POLICY ADVISORY GROUP**Meeting - 11 June 2019**

Present: D Smith (Chairman)
T Egleton and D Saunders

Apologies for absence: M Bezzant

37. MINUTES

The minutes of the Customer Services and Business Support PAG held on 4 March 2019 were approved.

38. DECLARATIONS OF INTEREST

There were no declarations of interest.

39. PROGRESS ON IT STRATEGY IMPLEMENTATION

The Head of Business Support updated Members on the ICT Strategy and moving the Council's ICT desktop services and infrastructure estate to the Microsoft's Azure Cloud and to use PowerOn, through the CCS G-Cloud framework to provide professional services to deliver these cloud migration projects. In her update Members noted the following:-

- The contract had been signed with PowerOn. Project Initiation had commenced and internal alignment. This would provide detailed project plans for the pilot and roll out.
- IT desktop provision would be upgraded from Windows 7 to Windows 10 with a new version of Office 365. The first part of the Windows 10 build had been completed. These systems would be piloted during July, August and September and rolled out to Services during the last 3 months of 2019. To plan for effective roll out and adoption of the software a survey had been conducted on which staff had experience of using Windows 10 / Office 365 and to find staff who would like to get advance training and be early adopters.
- Journey to the Cloud intranet site had been set up.
- There would be a new method for remote access.

A Member asked if Windows 7 and 10 would look the same. The Head of Business Support reported that it would look similar – the appearance would be more 'tiled', however there was no advantage to this without a touch screen. In terms of officers dealing with the system change training would be provided and also her team would be 'floor walking' to help deal with any specific issues. In relation to a question on the new Unitary District Council it was noted that the County Council and Wycombe District Council were using the same programmes and Aylesbury Vale District Council were also using cloud technology. In terms of IT support for Members a report would

be submitted on the options available but at the moment it was expected that Members would continue using iPads. Members were also informed that Finance staff would be using the SAP system in the new Unitary District Council.

40. **CUSTOMER EXPERIENCE STRATEGY UPDATE**

The Head of Customer Services reported that they were hoping to go live with the new system on 20 June 2019. The new website and customer account would be promoted to customers through their contact with the Council and service provision. Efficiencies should be delivered through an increase in online processes. There would be a demonstration of the new system on Monday 17 June at 6pm at South Bucks District Council. Information would also be included in the Members Bulletin.

Services going live

- 20 June waste services and the customer account
- Middle of July - Environmental Health
- End of August - Licensing
- End of August – Members portal

In response to a question it was noted that the Members portal would not have any ward data to start off with but would be gradually populated with information from services. The new system should override the need for department mailboxes. The Planning Service would be the last service to be moved over to the new system and it would not be a full migration. Members noted that waste received a high volume of calls compared to other areas in the Council so the new system should make an immediate difference to this service. The data would provide better information which could be used to manage contract performance.

41. **EXEMPT INFORMATION**

RESOLVED that under Section 100(A)(4) of the Local Government Act 1972 the following item(s) of business is not for publication to the press or public on the grounds that it involves the likely disclosure of exempt information as defined in Part 1 of Schedule 12A to the Act.

42. **APPLICATION FOR DISCRETIONARY RATE RELIEF**

The PAG considered an application for Discretionary Rate Relief. At a previous meeting the PAG had requested further information in support of the application for 2019/20 to enable it to decide whether the organisation had demonstrated that it was providing added value to the local community as currently the organisation had a number of access restrictions to residents. A letter had been received from the organisation providing further information in support of their application to show how they provided added value to the community.

Members discussed the application and considered that the letter did not include enough significant benefits for the community to award Discretionary Rate Relief.

Having considered the advice of the PAG the Portfolio Holder **AGREED** to **RECOMMEND** to Cabinet that relief should not be awarded for this organisation in this instance.

The meeting terminated at 6.40 pm

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SUBJECT	Customer Experience Programme
RELEVANT MEMBER	Councillor D Smith, Portfolio Holder for Customer Services and Business Support
RESPONSIBLE OFFICER	Yvonne Hadlames, Customer Services Manager (Acting Head of Service)
REPORT AUTHOR	Yvonne Hadlames, yvonne.hadlames@chilternandsouthbucks.gov.uk (Customer Services Manager (Acting Head of Service)) Simon Vockins, simon.vockins@chilternanadsouthbucks.gov.uk (Implementation and Support Manager)
WARD/S AFFECTED	All

1. Purpose of Report

To provide a brief progress report on the Customer Experience Programme and the plans to implement the aims of the strategy – to put the customer at the centre of what we do, in line with our ‘Stronger in Partnership’ strategy.

RECOMMENDATION:

1. That the report be noted.

2. Executive Summary

The Customer Experience Programme continues to mobilise a phased approach with service areas. The Implementation Team are currently engaging with services for the 2nd Phase.

The first service to Go Live was Waste and Cleansing on the 24th June. The mobilisation of Waste also incorporated all the new digital platform systems. This included:

- the launch of a new Customer Account,
- a Customer Relationship Manager (CRM lite),
- a knowledge base,
- the website refresh
- the CRM system for Waste to manage tasks
- intelligent, integrated forms.

The Go Live was a successful launch. The new customer account was available on both websites for residents and businesses to register. **146** customers registered on the first day. Currently, there have been **5,500** user registrations up to the 3rd September 2019. The decision was made to have a gradual marketing approach, with guidance issued on social media and on the website. Due to the other services phasing in we did not want to put residents off using the new platform and the customer account because as at

yet, not all services are available. The accounts are publicised at the top of the website landing page and ahead of and upon completion of a waste form online. The customer services team continue to sign customer up to the account when they contact us via Face to Face (F2F) or telephone.

Over **20,000** transactions have been processed through the new platform since the Go Live date, higher than anticipated. The increase in contact will be due to customers being able to easily self-serve and some services were previously only available to request in office opening hours. We have seen an increase in replacements bins with payments.

Wycombe District Council website pages continues to link directly to the CDC website. WDC residents can also register for an account. Wycombe officers have been consulted over these changes.

Users can receive updates and communicate with the Waste team via their account. Clear Service Level Agreements (SLA) are detailed on the customer account and this also shows when the SLA has been breached. The waste generic inboxes have been closed, so no unstructured data is being sent to Waste via these communication channels.

The following integrated forms were in place for Go Live:

- missed bins,
- green waste renewal,
- empty contaminated bin

These were integrated into the Contender back office system and there is integration to Biffa and Serco. Since Go Live, the following additional forms have had integration added:

- replace a container
- container repair
- report street cleansing issue
- report dead animal
- report abandoned vehicle

One form awaits integration – bulky waste. The delay is due to an upgrade to the Waste Contender system. This will be launched by the end of September.

Engagement with contractors took place in advance of the Go Live. The Implementation Team have delivered training and supported the team to utilise the new way of working pre Go Live. Post Go Live the support team have continued to support the back office Waste delivery team. A stabilisation meeting will take place on

the 5th September, as we move towards the Service Deliver Model to be adopted during business as usual.

Performance dashboards are available through the digital platform and we continue to develop these.

Migration of our current websites to The Cloud took place on the 4th March 2019. This is now managed and maintained by GOSS.

Issues and actions taken post Go Live

- There was an increase in workload for the Waste Team for a period of time as they transitioned from the old way of working to the new. A further fix was required on the missed bin reports actioned by the customer services team. This did not affect the customer account or reports online and is now resolved.
- A roll back was required on some service requests for the customer services team only, W/C 01.07.19 for one week. This was due to issues with the green waste renewal forms and identifying 2nd green bin requests, which is now resolved.
- System performance issues on the new platform caused longer than average call handling times due to the slow speed on a search request. This has now been resolved by GOSS adding extra resource to the server that hosts the software.
- The search facility on the CRM lite was not searching correctly and caused issues finding customer records causing long than average call handling times. This has been resolved with an enhanced search facility, which now finds cases in a matter of seconds.
- System performance issues caused problems for the Waste team to search, assign and close service requests on the new platform. This was resolved by offering them a different way to search for service requests, adding a filter to speed up load times considerably.
- System performance is being monitored and significant improvements have been made.
- GOSS and the support team have been supporting the service delivery for Waste through the new digital platform.
- The stabilisation meeting for waste takes place on the 5th September

Performance Indicators

- Performance indicators show a reduction in the hand on/transfers of calls to the Waste team by 63.1% in August 2019 compared to August 2018.
- The new system enables Waste to identify all outstanding requests in date order, repeat contact and high priority escalations.
- Currently; there have been 5,500 user registrations up to the 3.9.19.
- Complete performance reporting will be made available in September.

Phase 1 Licensing and Environmental Health

A different approach for mobilisation for Environmental Health and Licensing is being taken. This decision was made by the Project Team and Project Board. Phase 1 delivery and Go Live dates need to be adjusted due to the complexities of the Waste Go Live and limited resources from the support team and GOSS to ensure the issues, bugs and fixes were in place before moving to the next two service areas.

An interim solution has been put in place for Environmental Health. The mainline number publicised for contact was moved to the centralised Customer team on the 19th July. The changeover was seamless. The customer service team now triage the calls for Environmental Health, only transferring when required. All the information is held on the knowledge base to answer Environmental Health queries. The knowledge base was created in conjunction with customer services and Environmental Health. Environmental Health forms and integration to the customer account will be handled in phases, trickling in the forms across a period of four – six weeks. There has been a clear reduction in abandoned calls for the Environmental Health line since 19th July and more calls are being dealt with at the first point of contact, with the customer advised about service request processes to ensure we capture all the information required

Licensing update: A similar approach will take place with Licensing, with new forms and integrations introduced in order of preference and higher usage. This decision has been made collaboratively with the service area, Customer Services, and the Implementation Team. The mainline Licensing publicised number will move to the CS team allowing a triage service and minimal transfer to Licensing. The information for the service will be available within the knowledge base and training will be provided by the support team trainer. This is pending final approval from the Licensing Manager.

The completion timescale to deliver the full range of Environmental Health and Licensing integrated forms, along with CRM integrated forms and visibility on the customer account is by the close of October 2019

Phase 2

Work continues on the Member portal. The delay is due to GOSS segmenting data by Ward, which is proving a challenge. We now have a solution to this which means work can continue.

Electoral Registration will now be delayed in phase 2 due to the uncertainty round the timing of a General Election.

Community Safety and Community and Leisure will continue to mobilise in Phase 2, and the resource requirement to develop their requirements can be managed in-house. Housing will continue to be mobilised in Phase 2.

Parking has now moved to the same time as Electoral Registration.

Re-engagement sessions have been held with all service areas in Phase 2 and 3, demonstrating the platform and reminding them of their requirements and service catalogues.

Timescales for Phase 2 delivery, Phase 3, and the remaining Phase 1 services areas, are shown below.

	Y:	2019							2020					
	M:	Jun	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Phase 1: Waste		Go Live 24.6.19			Snagging 5.9.19									
Phase 1: EH					Go live 30.9.19	Snagging 31.10.19								
Phase 1: Licensing						Go Live 31.10.19	Snagging 30.11.19							
Validation and Engagement		Initial Engagement and Communication with all service areas		Validation of requirements										
Healthy Communities					Community Safety, Community and Leisure									
						Housing								
Legal and Democratic Services and Parking							Re-engage	Democratic Services and Land Charges and Parking						
Revenues and Benefits, Planning Development Management, Planning Enforcement and Building Control								Re-engage	Revenues and Benefits, Planning (Development Management, Planning Enforcement, and Building Control)					

Phase 3

- Revenues and Benefits
- Planning
- Building Control

Although these services are now out of scope for the project we will continue to work with Revenues and Benefits, Planning and Building Control to identify better solutions for the customer and opportunities for improvements using interactive web forms and a website refresh that can easily be achieved without any material changes to processes or new back office integrations..

The smaller supporting projects still continue:

- The communications calendar.
- Screen pop
- Performance management and building dashboards.
- Nudge theories and personas.
- Centralised Compliments, Comments and Complaints – a new intelligent form and mobilisation for the 3C’s to the CRM digital platform by the end of October.

Regular programme meetings have been scheduled to monitor progress and highlight any risks and actions. These are as follows:

- **A weekly team huddle**, where the implementation team met to discuss the work of the past week and the plans for the coming week
- **A fortnightly Performance Management Performance Review (PMPR)**, where the internal project managers meet with the project managers from GOSS. Ahead of this meeting, each project manager completes their own PMPR report, for each of their projects, which feed into a fortnightly programme report. Actions and risks are also identified and discussed at these meetings, alongside general progress
- **A weekly technical meeting with GOSS**, where using 'screen-share' technology the implementation team discuss issues around the build of the forms and the integrations
- **Every four weeks we hold Project Board meetings**, where the project managers meet with the Project Sponsor and Heads of Service

Alongside these meetings, we have developed project tools to track progress and record valuable information:

- **Project Plans** – we have a comprehensive project plan for each of the projects that make up the programme, showing the milestones and the action points
- **PMPR reports** – which help us track progress and the actions to be carried out over the coming fortnight
- **Training Needs Analysis** – a plan has been developed which identifies the training that needs to be delivered, to what audience, and what materials need to be prepared
- **Cost Tracker** – a spreadsheet to enable us to track the costs of the programme on a month by month basis
- **Action Log Tracker** – which is combined with our programme report
- **Risk Log Tracker** – again, this is combined with our programme report
- **Contract Schedule Review** – to ensure GOSS are hitting their milestones
- **Forms tracker** – showing the component parts of the forms, and the change impact they are likely to have on the customer and the service area.

3. Consultation

We continue to engage the services of 4OC in a consultancy role. They have been involved in our fortnight PMPR meetings and with supplier engagement. They have also helped us to re-align the programme plan.

4. Unitary Implications

Phase 3 will no longer be phased in as originally detailed in the Business Case. With Vesting day and Unitary transition and transformation there will no longer be procurement of a new single system for Revenues and Benefits until the four districts services come

together as a single operation, not expected to be before the end of 2021. There are no resources which will be deployed to integrate with two Revenues and Benefits systems.

Planning and Building Control will also be due to go through transformation, which will now be post vesting day and will be in the context of moving towards single services across the new Council area. Mark Jaggard has advised that he does not want there to be any major changes to processes within these service areas until the service is shared in the unitary authority. However, the Customer Experience Programme can still add some value to these service areas, to improve the customer's ability to access services.

The decision to stop the programme at the end of Phase 2 due to the establishment of the new Council will have a significant impact on the financial benefits of the programme,. This has been discussed by the Project Board and added to the risk register, and is reflected in the draft financial plans for the new Council.

For the remainder of the programme up to April 2020, activity will be scaled back, to look for ways to use more efficient processes to improve the customer experience, without integrating into back office systems, or significantly changing processes.

5. Next Steps

The next step will be continued work on the phase 1 service areas, bringing the processes to Go Live and stabilisation to business as usual through the service delivery model.

The implementation team will then commence work on the phase 2 service areas through September to January 2020, and will look for ways of increasing customer satisfaction and access to services with the phase 3 service areas.

Background Papers:	None
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SUBJECT	Write offs 2018/2019
RELEVANT MEMBERS	Cllr B Gibbs, Portfolio Holder for Resources Cllr D Smith, Portfolio Holder for Customer Services and Business Support
RESPONSIBLE OFFICER	Richard Charters, Revenues Operations Manager (Acting Head of Service)
REPORT AUTHOR	Richard Charters, 01494 732272, Richard.charters@chilternandsouthbucks.gov.uk
WARD/S AFFECTED	All

1. Purpose of Report

This report is to report on the final position for write offs for the full year 2018/2019.

RECOMMENDATION:

- Customer Services and Business Support Policy Advisory Group are asked to note and comment on the write offs for 2018/2019.**

2. Content of Report

2.1 Members have requested that amounts written of are reported on an annual basis. This is the report detailing amounts written off in the 2018/2019 financial year.

2.2 The increase in the level of write offs and the large number and amount is attributable to the South Bucks DC Arrears Recovery Project. At the time of the Revenues Shared Service Review it was identified that the level of arrears of Council Tax, Business Rates and Housing Benefits Overpayments were an area where the new service could improve recovery. This action would bring increased income to South Bucks District Council, Buckinghamshire County Council, Thames Valley Police Authority and Buckinghamshire & Milton Keynes Fire Service. The project commenced in August 2016 and was planned to last for two years. The project generated considerable income to South Bucks District Council from the recovery of arrears, however the remit of the project was to reduce the arrears outstanding and in many circumstances the only option available to us is to write the debt off. This has been one of the focuses of the project team to ensure that the service has manageable levels of arrears.

Type of Debt	Numbers 2017/2018	Amount	Numbers 2018/2019	Amount
Sundry Debts	86	£127,544.93	80	£61,598.75
HB/CTS overpayments	163	£117,411.40	494	£308,704.79
Council Tax	1661	£445,421.56	2490	£825,089.57
Business Rates	65	£62,792.63	445	£488,754.01
Penalty Charge Notices	15	£750.00	51	£3141
Total	2012	£753,920.52	3560	£1,687,288.12

Sundry Debts

2.3 There were 81 write offs totalling £61,598.75 written off in 2018/2019. The majority of these were bed and breakfast / temporary accommodation charges for homeless families.

The majority of these were where the debts were unable to pursue or recover due to the debtors lack of funds or no forwarding address was established. One debt of £1567.14 was written off by Cabinet

Housing Benefits, Council Tax Benefits and Council Tax Support Overpayments

2.4 This year there have been a total of 494 overpayments written off and this amounted to £308,704.79. This compares to 163 overpayments amounting to £117,411.40 in the 2018 financial year

2.5 The South Bucks Recovery project focused on arrears from previous years which date back a number of years, the amounts written off in this financial year are mainly due to the fact that they are old debts and so are past the time limit to enable us to take recovery action, uneconomical to pursue, insolvent, gone away no trace and deceased. The table below identifies the main reasons for write offs of these cases.

Reason for write off	Number 2018/2019	Amount
Outside of statutory limits	123	£93832.71
Uneconomical to pursue	39	£1200.63
Insolvent	33	£21345.13
Gone away	61	£39902.23
Deceased	74	£37213.44
Decision to write off	148	£113,981.19

Council Tax

2.6 In 2018/19 there were 2490 amounts of Council Tax written off and this totalled £825,089.57. It should be noted that a large number of this total were cases where the debts were written off spanning several years.

2.7 The large number of write offs are due to the work being carried out on the recovery project to focus on previous years' arrears. The key categories and amounts of write offs are shown in the table below:

Category	Number	Amount
Costs written off	947	£79551.54
Debtor insolvent	80	£56900.45
Uneconomical to recover	1193	£706,908.97
Credits written off	125	(£21901.10)

2.8 The rest of the write offs are mainly small balances, disputes over liability and liability adjustments.

Business Rates

2.9 In 2018/2019 there were 445 amounts of Business Rates written off totalling £488,754.01. This amount is actually related to 195 companies or individuals due to the fact that the majority of the write offs spanned several years of charge periods.

2.10 It should be noted in this category two of the debts written off totalled £157,146.56 these were cases where car boot sale companies had a dramatic increase in their rateable values which meant the companies could not pay their rates and subsequently placed themselves in voluntary liquidations. Claims have been made to the Insolvency Service, but are unlikely to realise any dividend.

Penalty Charge Notices

2.11 The table below shows the breakdown of Penalty Charge Notices that were written off on a quarterly basis for 2018/19:

PCNs 17/18	Number	Amount £
Quarter One	7	350
Quarter Two	9	483
Quarter Three	10	665
Quarter Four	25	1643
Total	51	3141

3 Corporate Implications

3.1 Financial – There is a financial impact on the Council when debts are not recovered, however provision is made in the accounts to accommodate the writing off of bad debts.

4 Links to Council Policy Objectives

4.1 This links to the following objective- Delivering cost effect, customer focused services

5 Next Step

5.1 Members are asked to note the write offs for the 2018/2019 financial year.

Background Papers:	None.
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