

# Taunton Deane Borough Council

**Executive – 4 December 2013**

## **Customer Access Strategy**

**Report of the Strategic Director, Joy Wishlade and Project Manager, Dean Emery**

(This matter is the responsibility of Executive Councillor Stock Williams)

### **1. Executive Summary**

The last time the Council updated its Customer Access strategy was in 2005. This needs updating in the light of social and technological changes and the Council's current financial position. The updated strategy proposes a significant shift towards self service and the use of technology for the majority of enquiries, whilst focussing resource for face to face provision on those with the most complex requirements.

### **2. The Customer Access Strategy**

- 2.1 The full Customer Access Strategy is found at Appendix A.
- 2.2 It is vital for the Council as it moves forward with less resource at its disposal that technology is used wherever possible to provide access to services. For many of our population this will be an improvement on the current situation as it will enable access to key services on a 24/7 basis. We must also make suitable provision for those who do not have access to technology and this is highlighted within the strategy.
- 2.3 Clearly this change is not made without cost and there is a business case made within the strategy for the required investment.

### **3. Finance Comments**

- 3.1 In order to achieve the shift towards self service the Council is required to make an investment in the following:
  - The provision of a new, fit for purpose web site to provide full authenticated access to end to end transactional services using mobile devices

- The ability for staff to access and deliver services while visiting key sites within the community
- The provision of access points enabling customers to either self serve or interact with a member of staff to receive council services
- The provision of all applicable council data sets in an open data format

The total cost of these items is estimated as £320k one off investment plus an ongoing charge of £40k pa.

- 3.2 As will be seen in the Business Case section of the strategy there is also the requirement for each service, as part of its business re-engineering process, to implement an Channel Shift process – moving its way of operating wherever possible to self service. A further cost that needs to be included is to resource the on-going change required to implement the channel shift work. It is therefore suggested that £50k is allocated as a corporate resource to help support this work. Examples of issues that might need to be resourced this way are: expert help for services in setting up new systems, support for customers when they access services this way for the first time.

The total investment requirement is therefore £370k

- 3.3 Of these costs £190k is picked up within the joint services approach with West Somerset. Therefore, the Council will only need to find the balance of £180k. As circa 20% of current customer contact costs for phone and in person are currently funded from the HRA, it is proposed that 20% (£36k) of the £180k is also funded from the HRA.
- 3.4 The total funding requirement is therefore £180k, plus an ongoing cost of £40k per annum (to be more than offset by the savings this investment will enable).
- 3.5 One of the main purposes of implementing channel shift is to make financial savings for the Council. With this in mind it is estimated that a shift of 25% of both footfall numbers and telephone access numbers to web access and using the SOCITM approximate costs per transaction would bring an indicative saving to the council of c£241,000 per annum.
- 3.6 These savings are made by reduced officer time spent dealing with customers. To achieve these savings would require a rigorous implementation plan including new staffing structures reflecting the reduction in posts. For this reason it is recommended that the implementation occurs at the same time as the transforming of services as the council moves forward into shared services. This strategy will form a fundamental enabler to doing this differently in the future.
- 3.7 Not all these savings would accrue to the Council as some of the savings would fall within SW1 area.
- 3.8 This 25% shift is conservative and a higher shift could be achieved dependant on how robust the council wished to be. In order to realise the savings as 'cashable', the Council will need to reduce staff costs as a

result of the time saved, and potentially seek to reduce its costs with Southwest One.

- 3.9 This 25% shift is conservative and a higher shift could be achieved dependant on how robust the council wished to be. However, even with a 25% shift the payback on the one off investment of £180k would be made within 1years with an ongoing saving of c£200k in years following if all the savings accrued to the Council or, based on a 50/50 split with SW1 1.5 years payback with c£80k per annum saving ongoing. (Taking into account the extra £40k on going revenue cost).

#### **4. Legal Comments**

There are no legal issues raised by this strategy

#### **5. Links to Corporate Aims**

This is a key project identified in the Council's adopted Business Plan

#### **6. Environmental Implications**

There is the potential for this strategy to have a positive impact environmentally by reducing the need to travel to a council office to receive a service.

#### **7. Community Safety Implications**

There is no impact on community safety

#### **8. Equalities Impact**

An Equality Impact Assessment (EIA) for this new way of working has been carried out (see appendix B)

The EIA will be reviewed and change as required by each service line during the implementation of these changes.

#### **9. Risk Management**

- 9.1 The purpose of the strategy is to update the council's approach to customer access and by doing so, to make financial savings. However, to achieve this will require a rigorous implementation programme and data collection.
- 9.2 There is a risk that without a corporate resource to lead implementation that we will continue to deliver services as we always have done and the step change will not be made.  
To mitigate this risk it is suggested that a one off £50k budget is created and held by CMT to help resource the implementation programme.
- 9.3 There is a financial risk around the realisation of the savings as a) costs are based on SOCITM figures b) some savings will accrue to SW1 rather

than the Council and the split will not be fully understood until more detailed work on implementation is carried out c) some of the savings may be made as part of the transforming of services within the joint working proposal with West Somerset.

These risks will be understood further as the detailed implementation work progresses.

## **10. Partnership Implications**

- 10.1 In delivering the projects from this strategy and action plan we will need to work closely with a wide range of partners (business, community, delivery and voluntary as well as statutory agency partners) to explore opportunities for delivering services in partnership as well as alongside other community facilities. In addition to providing electronic means of accessing services, we also need to consider how working in partnership we can better deliver the high quality face to face provision that our vulnerable customers need. See paragraph 15 of Appendix A

## **11. Next Steps**

- 11.1 In order for the Council to better meet the needs of its residents, to use its resources in a more focused way and to achieve on-going savings, it should adopt the strategy of moving to digital service delivery wherever possible.

If approved, a detailed implementation plan should be drawn up to include:

By the end of 2014:

- Agree a joint implementation plan with SW1
- Commission and go live with a new transactional web site
- Draw up a detailed channel migration plan with each service as part of their service transformation planning
- Increase the use of automated phone lines

And by the end of 2015:

- Cease to provide a postal option
- Be proactively providing information in a wide range of new ways
- Up-skill officers to be able to deliver multi departmental services around the Borough
- Ensure all officers know how to use and signpost customers to the simplest and most cost effective route

## **12. Corporate Scrutiny**

Corporate Scrutiny recommended its adoption to Executive conditional on an extensive multi- media publicity exercise to enable public understanding and confidence in the new systems which must have provision for all disability needs.

### 13. Recommendations

The Executive is requested to consider the attached strategy with a view to:

- a) Recommending its adoption
- b) Recommending Full Council the release of £144k from General Fund Reserves and £36k from HRA to enable the strategy to be implemented. This will include £50k to be allocated to revenue costs and £130k to be added to the Capital Programme, funded from revenue resources.

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# CUSTOMER ACCESS STRATEGY

## 1. Introduction

- 1.1 The latest customer access strategy for Taunton Deane Borough Council was approved in 2005 in the lead up to the “Improving Services in Somerset” work. This now needs revisiting and updating in the light of both social and technological changes, the Council’s changing role and the current financial climate. This report sets out the strategy for moving forward.
- 1.2 Against this backdrop there is significant scope for the Council to be more cost effective in its approach to customer access. This document is designed to describe the overall vision and provide a pathway to take that vision to reality.

## 2. About customer access

- 2.1 At a time when councils are facing unprecedented cuts in central government funding, customer access needs to be seen as an integral part of service delivery and not just the “front-end”. Changes and improvements in customer access can only be achieved with the full cooperation of each service; indeed these improvements should also drive change and the way in which operational services are delivered.
- 2.2 Typically, councils have provided “blanket” provision across all access channels (post, face to face, phone and more recently web) to all customers. This is costly and unnecessary. There is an opportunity for Local Authorities to reduce provision and force change. This may affect customer satisfaction in the short term. However, to counteract this, it will be necessary to ensure that the designated access channel functions in a way that matches or exceeds customer expectations.

## 3. Background

- 3.1 The primary customer access channels we currently have are the SW1 Customer Contact Centre, face to face customer services mainly based at Deane House (although there is some access within communities via community offices), post, email and the website.
- 3.2 However, it is also recognised that services have regular contact directly with residents and businesses and that this is a vital part of the end to end service the council delivers to residents and businesses. The Customer Access Strategy is a core strategy and an enabler to all services and as such, should be setting a corporate framework of

## APPENDIX A

change that must be reflected in service strategies and business planning.

3.3 Current statistics of how customers are contacting the Council are as follows:

- In Person (Face to Face)	72,486
- Telephone	148,412
- Internet (website hits)	560,969
- Kiosk (Banking Hall)	24,346
- Kiosk (Wellington)	9,489

*(Source – Stats from Customer Services 2012/13)*

This shows that even currently the main choice for contacting the council is via the internet.

Those who come to Deane House in person come for the following reasons:

Housing, Building Control, Environmental Health, Licensing, Planning, Revenues, Waste and Benefits.

Nearly 50% of the visits fall within three following reasons: Housing, Revenues and the Benefits service.

Of those telephone calls that come into the Contact Centre 4% are transferred to the back office.

3.4 The typical cost per contact via the different channels is as follows:

Face to face	£ 8.64
Telephone	£ 2.23
Web	£ 0.08

*(source SOCITM 2013)*

3.5 One of the key findings in the recent SOCITM report “Better Served” on customer access is that councils can make significant cost savings through better management of customer access. Cost reduction comes from reducing volumes of phone and face to face enquiries.

Other key findings on ways to reduce call and face to face volumes without reducing customer satisfaction are:

- Resolve more enquiries at first point of contact;

## APPENDIX A

- Work to reduce 'avoidable contacts' by providing more and better information at appropriate points in the customers journey and setting service delivery expectations;
- Encourage people to self serve their enquiries through using the web (both simple and complex transactions);
- Customer channels must be managed together to reduce volumes;
- Collecting customer data for analysis to identify improvement is difficult but not impossible
- Benchmarking highlights variations in management of customer access and areas for improvement;
- Data analysis will reveal opportunities for front or back office collaboration in cost saving process improvement;
- Maximising customer access efficiency requires an excellent website integrated with all other customer channels;
- Customers need to be made aware of services on the web and encouraged to use them.

### 4 The Vision

- 4.1 In essence the vision for customer access is to create a web based portal as the primary gateway for all customer transactions, acting as the Council's virtual self serve office for customers.
- 4.2 The vision is to bring services to the customer using technology that allows self service without a loss of service excellence. Thus the website will act as the primary business window to the wider community making key services available 24hrs 365 days a year.



## APPENDIX A



Other access solutions will also be embraced as part of the channel hierarchy programme described within this strategy.

### 5. The Future

5.1 In order to meet the needs of customers we must provide services that are:

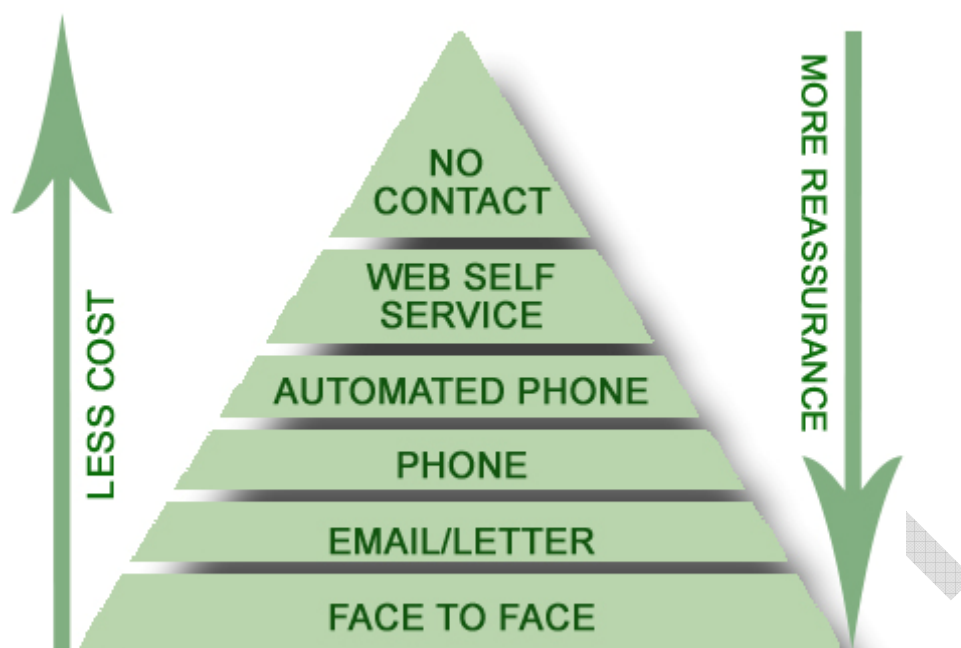
- Easily accessible
- Simple to use
- Consistent
- Streamlined
- Convenient
- Cost effective
- Robust
- Secure

5.2 In order to do this we must be driving customers to use the most cost effective contact channels, and make it easy and efficient for them to do so by:

- Encourage customers who can self serve to do so
- Work with Partners (other public bodies)
- Proactively offer creative solutions
- Ensure a planned and informed approach based on need
- Promote equality and eliminate any potential discrimination

5.3 This is called a Channel Hierarchy and is explained by the diagram below:

## CHANNEL EFFECTIVENESS



This model shows that as we move up the triangle the cost of delivery typically gets cheaper for the organisation. However, it is recognised that for some types of contact a greater level of human contact will be required particularly for those that require some level of reassurance.

It will be important to anticipate where the council will generate contact that requires this as part of its move towards greater self service.

### 6. Core Principles

6.1 The strategy is based on a number of core principles:

1. Access to services must be efficient and cost effective. We will use the Council's website and contact centre for high volume customer contacts and face to face customer contacts only for the more complex and individual needs.
2. Self service options via the web and via automated telephony will be available 24/7 wherever possible.
3. The Council will promote the most cost effective contact methods that are appropriate.
4. The Council will continue to support face to face contacts in key community locations

## APPENDIX A

5. The Council will not discriminate against any individual or group by unreasonably limiting the choice of contact methods available.

### 7. Current Digital Activity and Usage

7.1 Information from the ONS “Internet Access Quarterly Update” and “Internet Access 2013” datasets give the following information. All the data estimates are nationally based except where specified as Somerset specific.

- An estimated 89% of adults in Somerset have used the internet at some point and estimates show an increase year on year.
- Key non internet users are older people, people with disabilities and people on low incomes.
- One person households are the least likely household type to have internet access, notably lone people aged 65 or over
- As at 2013 almost 73% of adults use the internet every day with 61% using a mobile phone or portable computer to access the internet on the go.
- The main reasons cited for not having internet access in 2013 were don't need it (59%), lack of skills (20%) and cost of equipment (13%)

7.2 In addition a recent survey of the council's tenants found that 47% do not have access to a computer at home or at work

### 8. Digital Inclusion

8.1 To avoid digital exclusion we must ensure that those who do not have access to digital channels at home or work are not disadvantaged when communicating with the council.

8.2 The Council's strategy should be wherever possible to enable access via the most cost effective channels.

8.3 The council is already working towards this to deal with the implications of national government digital agenda in areas such as Universal Credit. Initiatives within the council's housing and benefit sections are seeking to address these issues and these will be a key strand of implementing this customer access strategy.

### 9. Implementation

9.1 In order to enable the implementation of the above channel hierarchy, the Council will require the right level of technological infrastructure. The primary means by which customers contact the Council will be via a Customer Portal available via the internet.

## APPENDIX A

- 9.2 The portal will act as a virtual reception where customers can access the services delivered by Taunton Deane achieving full delivery as if Face 2 Face. By using modern day technologies customers can interact with the authority from their homes, saving travel time, costs and waiting times plus many more efficiency benefits. Where possible key / transactional council services will be accessible 24 hours 7 days a week 365 days per year as apposed to the traditional Monday to Friday within set hours. Modern communities now need to interact with services within their busy life styles and individual needs.
- 9.3 Community Hubs will be open where computers / access points and trained staff will be able to help resolve reason for visits by reactive training, up-skilling communities on self service resolution. These are particularly required in areas where internet access is least likely to be available or used. It is envisaged that current community facilities will be used.
- 9.4 Travelling officers will have access to the Portal on the move and will be able to provide assistance where required. By using technology, delivery of customer services via technical advances means more efficient delivery and flexibility of change in modern times, services become part of the community and not something that needs to be arranged.
- 9.5 As identified in paragraphs 7 and 8, some of the community will require support and help to access services in a digital format. This will become a key strand of work within the implementation plan and will be cross cutting across the different areas of the council and with partners. Work in this area is referenced further in paragraph 13.

### 10. What this means

- 10.1 In order to achieve the objectives and to make the financial savings of moving customers to cheaper methods of contact wherever possible, will require us to cease to provide a similar level of service via each of the access channels.:

*To achieve these objectives we will:*

1. Create a fully interactive website with Council systems helping to update changes “there and then”
2. Train customers on the use of the portal by resolving their enquiries by using the website with them
3. Aim to cease to provide a postal option entirely, except in instances where there is a legal imperative to do so;

## APPENDIX A

4. Proactively provide information to customers in a wide range of existing and new ways, reducing their need to contact the council to seek it out e.g. twitter, mobile, mailing lists, automated phone lines, FAQ emails;
5. Up-skill officers to be able to deliver multi departmental services to a customer, within Hubs around the Borough.
6. Embed a culture in all council officers of both using and signposting the simplest and most cost effective route for a customer to undertake a transaction;
7. Continuously improve the content and pathways on the TDBC website so that council officers and customers *want to* use it as their first port of call and can easily do so;
8. Use incentives to facilitate the channel shift e.g. shorter processing times for customers or reduced costs to services, or disincentives e.g. shutting channels down entirely where they are not necessary;
9. Seek to manage the demand for our services by providing more and better information at appropriate points in the customer's journey and setting service delivery expectations. It is also important to be aware that increasing awareness of channels may increase demand in some areas;
10. Increase the use of automated phone lines with key pad and recorded information wherever possible.
11. Efficient use of community hubs where officers can deliver a multi tasking service where required and to support the growing self serve culture in TDBC. Using our hubs will help deliver to the wider community a more tailored service to those that really need it. It is anticipated hubs would be in existing or planned community office in East and North Taunton, Wellington and a main hub located within the centre of Taunton, possibly in the main council office.
12. The customer services team would be delivering services as multi functional officers being able to deal with a range of service delivery enquiries up to a certain level.
13. Whilst its important to the community to have the face to face service those officers in the hub will be there to support customers with the 'portal' access as this where possible should always be the first place customers go to have their required service delivered. It will also be understood that certain residents will always need face to face service.

## APPENDIX A

### 11. Current Initiatives

- 11.1 The council is already introducing automation via telephony as SW1 are installing new equipment in the contact centre which will enable use of automated telephony for payments through the switchboard. The aim is to ensure 24/7 availability of a payments solution for customers with little or no access to internet connectivity to enable payment of rent, Council Tax and other debts on time and through the familiar medium of the telephone. The system is voice activated rather than a push button system to ensure accessibility is inclusive and should anyone encounter problems there will be the ability to go through to an adviser during office hours if necessary. The switchboard facility will move calls away from the Contact Centre that are not directly aimed at being delivered by the team and will ensure they can focus on their core business. Callers into the system will be able to request the name of the service or person they wish to speak to and the system will intelligently route the call to the correct area – announcing the call before putting it through.
- 11.2 These two areas of automation should be seen as pilots to future ventures to automation should the authority wish to offer greater choice to customers – the system links to the website for service delivery and would be able to provide the customer with the ability to carry out a simple transaction without human intervention.

### 12 Channel Shift

- 12.1 In order to fully implement a Channel Hierarchy we need to plan for Channel Migration
- 12.2 Channel Migration or Channel Shift is the process by which we will seek to encourage customers to access services via channels other than those they would normally choose.
- 12.3 The highest point on the hierarchy triangle is no contact at all and therefore there needs to be a plan to resolve “avoidable contact”. By identifying customer contact that is “avoidable” the council are better placed to redesign the way services and information are made more accessible for our customers so they do not have to make unnecessary contacts which are both frustration for the customer and inefficient for the council.
- 12.4 Deliberate channel shift is the design and marketing of effective and efficient channels because they are the most appropriate channels for the type of contact, customer and service in question. Shifting customers to particular channels involves behaviour change on the citizen’s part but once they are aware of the new channels available they will use the one that works best for them.

## APPENDIX A

12.5 In order to encourage customers to shift to new and more effective channels each service will be requested to plan out a “channel migration” proposal using improved technology, web design and automated telephony methods. This should be aligned to the streamlining and business process re-engineering of services which will take place as part of the joining up services with WSDC. The new Senior Joint Management Team will be responsible for driving this through to implementation. The Programme Management role within the new management structure will also have a key role in ensuring there is a programmed approach across the council functions.

12.6 An underlying principle the Council should adopt is:

*Services must be designed according to the hierarchy triangle allowing 24/7 web access first and ensuring all channels have access to the same information to accommodate channel hopping.*

### 13. Customers with special needs

13.1 Customer access is not solely about shifting customers to use cheaper means of access and reducing demand where possible. A crucial and integral element of customer access is about ensuring that vulnerable residents and those with complex or urgent needs are able to access services whenever and however they need to.

13.2 It is vital that this strategy enables Taunton Deane staff to identify vulnerable residents, by whichever means they use to contact the council, and act promptly, effectively and in a joined up way to ensure they receive the support and help they need, specific to their situation.

13.3 A small but significant number of individuals will continue to need a more personalised service, which is sensitive to their complex needs, delivered through face to face meetings, within the proposed community hubs, in partner’s buildings or their homes. Identifying and ensuring that this provision is available to those individuals when they need it, is central to this strategy. In some instances it may be that these complex or sensitive needs can be appropriately met via self service, particularly in situations where the demand is potentially occurring 24 hours a day. Where these situations are identified, our role will be to ensure the additional support is available to enable vulnerable individuals to make the most of the available self service options.

13.4 We anticipate that this project will highlight a number of ways that Taunton Deane could do more to identify, approach and provide support to vulnerable and hard to reach residents. These might include:

- Focusing resources on those who require additional help due to their needs;

## APPENDIX A

- Reviewing our approach to working and communicating with partners regarding high need customers;

### 14. Embedding customer access considerations in service delivery

- 14.1 Customer access is integral to the way that customers experience services and the way that those services are delivered. For channel shift to be successful in Taunton Deane, it is vital that customer access and channel shift priorities are acknowledged and accepted as a pivotal factor in service- level decision-making and the way services interact with their users. It is only through fully incorporating the channel shift within every section of the council that benefits can be realised from its implementation.
- 14.2 Importantly it should be noted that:
- This work cuts across the council and touches every service.
  - In order to deliver the strategy the whole organisation needs to be actively involved and “own” the changes.
  - The change will need to be driven by both the political and officer leadership of the organisation.
- 14.3 Taunton Deane’s services will go under a period of review and transformational change to meet the demands of the current financial situation and to join up with West Somerset services. To ensure that customer access and channel shift projects do not duplicate, overlap or counteract changes that are already taking place, customer access needs to be formally addressed and incorporated within these service reviews.
- 14.4 Should the West Somerset project go ahead there will be a period of service transformation and streamlining between the two councils. This would be the ideal opportunity to design in the channel shift approach into services.
- 14.5 The new management structure allows for Programme Management role reporting to the AD Corporate Services. It will be vital for this programme to be driven from the highest level within the council and managed through the transformation process.
- 14.6 In practice it is the responsibility of the new Directors / Assistant Directors to ensure that the necessary customer access considerations are being incorporated in their service review and that the appropriate actions take place.
- 14.7 It will be their responsibility to ensure that all managers are sufficiently informed and engaged in the customer access work and understand the resources that are available to support them in integrating this strategy with their existing and planned activities.



## APPENDIX A

14.8 It will be the responsibility of all individual officers within the organisation to act on a day to day basis in a way that promotes and encourages the use of preferred access channels, to support the migration of customers towards more cost-effective ways of interacting with the council.

14.9 It will also be vital to continue to work closely with SWOne to ensure that they focus their resource to deliver our strategy. This strategy has been drawn up in consultation with SWOne and their direction of travel is broadly similar.

### 15. Working with partners

15.1 It is important that any work we do to enhance customer access includes and addresses our relationships with other public and third sector partners and how this impacts upon our interactions with customers.

15.2 Our approach to improving customer access in Taunton Deane should be developed with partners. We need to ensure that we are providing access to services where possible through a common front door (be this physical or web-based), in a seamless and transparent way. In delivering the projects from this strategy and action plan we will need to work closely with a wide range of partners (business, community, delivery and voluntary as well as statutory agency partners) to explore opportunities for delivering services in partnership as well as alongside other community facilities. In addition to providing electronic means of accessing services, we also need to consider how working in partnership we can better deliver the high quality face to face provision that our vulnerable customers need.

15.3 Our aims would be to:

- Agree a shared vision for an improved model of customer access with partners in Taunton Deane;
- Drive web improvements that enable the customer to use integrated access channels to obtain information, services or transactions relating to any Taunton Deane public service organization;
- Ensure there is an integrated, joined up approach to identifying and supporting vulnerable customers.

### 16. The Business Case

16.1 In order for this strategy to be delivered investment will be required. The key investment requirements are:

## APPENDIX A

1. Hardware and software and professional services to deliver a new web site with
    - Registration and authentication services
    - End to end transactional capability
    - Devolved content management
    - Management reporting
    - Compliance with current security and accessibility standards
    - Integrated with social media channels
    - Compatibility with current mobile devices
  2. Mobile working for officers enabling delivery of services within community hubs and other locations.
  3. Provision of a number of access points enabling customers to either self serve or to interact with the back office from remote locations.
  4. Development of council data files so that data can be shared easily
- 16.2 The total cost of the above is estimated to be an investment of £320k plus an ongoing revenue charge of £40k p.a. However, of these costs £190k is picked up within the joint services approach with West Somerset. As this project has been approved the Council therefore needs to find the balance of £130k.
- 16.3 A further cost that needs to be included is to resource the on-going change required to implement the channel shift work. It is suggested therefore that a central pot of £50k is held to support this vital piece of work.
- 16.4 The total funding requirement is therefore £180k plus an ongoing cost of £40k per annum.
- 16.5 One of the main purposes of implementing channel shift is to make financial savings for the Council. With this in mind it is estimated that a shift of 25% of both footfall numbers and telephone access numbers (as outlined in Paragraph 3) to web access and using the SOCITM approximate costs per transaction would bring a saving to the council of £241,469 per annum.
- 16.6 These savings are made by reduced officer time spent dealing with customers and to achieve them there would have to be a rigorous implementation plan.
- 16.7 Not all these savings would accrue to the Council as some of the savings would be within SW1 area.
- 16.8 This 25% shift is conservative and a higher shift could be achieved dependant on how robust the council wished to be. However, even with a 25% shift the payback on the one off investment of £180k would be made within 1years with an ongoing saving of c£200k in years following if all the savings accrued to the Council or, based on a 50/50

## APPENDIX A

split with SW1 1.5 years payback with c£80k per annum saving ongoing. (Taking into account the extra £40k on going revenue cost).

### 17. Other Projects / Strategies

17.1 This project will need to work alongside other significant business change projects happening at Taunton Deane;

The following are significant projects that will impact on customer access that are already in motion;

- West Somerset
- Asset Management
- Universal Credit
- Work within the HRA on digital inclusion
- Council Accommodation project

### 18. Measuring Outcomes

In order to assess the effectiveness of this strategy in achieving these outcomes it will be important to measure progress. A proposed set of metrics to measure against could include:

- Levels of customer satisfaction with each transaction;
- Volumes per access channel;
- Number of repeat contacts;
- Percentage resolved at first contact;
- Financial savings achieved

### 19. Next Steps

19.1 In order for the Council to better meet the needs of its residents, to use its resources in a more focused way and to achieve on-going savings, it should adopt the strategy of moving to digital service delivery wherever possible.

19.2 If approved, a detailed implementation plan should be drawn up to include:

- Commission new transactional web site
- Draw up joint implementation plan with SW1
- Draw up detailed channel migration plan with each service as part of their service transformation planning

DRAFT

## APPENDIX B

### Equality Impact Assessment – pro-forma

<b>Responsible person</b>	<i>Joy Wishlade</i>	<b>Job Title Project Sponsor</b>	
<b>Why are you completing the Equality Impact Assessment? (Please mark as appropriate)</b>	Proposed new policy/service	Customer Access and Accommodation	
	Change to Policy/service		
	Budget/Financial decision – MTFP		
	Part of timetable		
<b>What are you completing the Equality Impact Assessment on (which, service, MTFP proposal)</b>	<b>Customer Access and Accommodation Project</b>  <b>This EIA is Customer Access</b>		
<b>Section One – Scope of the assessment</b>			
What are the main purposes/aims of the policy/decision/service?	<p><u>Project Mandate:</u> “to identify the future TDBC office requirements and customer access arrangements”</p> <p><b>Project Brief:</b></p> <p><u>Output:</u></p> <ul style="list-style-type: none"> <li>• A business case to provide office accommodation at a cost effective rate than the current provision.</li> <li>• A business case to provide customer access to TDBC services that is cost effective for the Council and meets the future needs of its customers including training and education where necessary.</li> </ul> <p><u>High level principles from Business Plan:</u></p> <ul style="list-style-type: none"> <li>• We will minimise our running costs and maximise our income streams</li> <li>• We will minimise our accommodation costs</li> <li>• We will maximise the use of technology to minimise our running costs</li> </ul>		

## APPENDIX B

	<p><u>Project Scope:</u></p> <ul style="list-style-type: none"><li>• To investigate the business case for consolidating other TD staff from other locations into the new premises</li><li>• To investigate solutions with other public sector partners either within new shared premises or within their current premises</li><li>• To develop a public access strategy to include all public access channels: web, physical premises, telephone with a view to a) minimising costs and b) maximising use of technology</li><li>• To identify the investment requirements to achieve longer term efficiencies</li></ul>
Which protected groups are targeted by the policy/decision/service?	<p><i>No protected groups are 'targeted' by these changes, all changes that are to be made will include those who are covered by the range of protected characteristics, as defined within the Equalities Act 2010 and include;</i></p> <p><i>Age, Disability, Gender Reassignment, Marriage and Civil Partnership, Pregnancy and Maternity, Race, Religion and Belief and Gender</i></p>

## APPENDIX B

<p>What evidence has been used in the assessment - data, engagement undertaken – please list each source that has been used</p> <p>The information can be found on....</p>	<p><b><u>Source Report: Taunton Deane Borough Council Equalities Information Report 2013</u></b></p> <p>Examples found below (these have been taken from the report noted above)</p> <p>Taunton Deane Borough Council is committed to the promotion of equality and diversity within our community. We will continue to consider the needs of everyone by considering the impact of our decisions, practices and policies. Where we identify inequalities we will act positively to remove or reduce them.</p> <p><b>Taunton Deane Corporate Business Plan</b></p> <p>The Corporate Business Plan is intended for staff, Councillors, residents and partner organisations. It sets out:</p> <ol style="list-style-type: none"><li>1. the Council's overall vision and aims for the area and how we will deliver them over a three year period</li><li>2. our approach to the internal transformation needed to ensure the Council is sustainable, affordable and fit for purpose during a period of greater demand for services but lesser resource to deliver them.</li><li>3. the basis for future budget setting and service delivery</li></ol> <p>The first stage of this project is <b><u>very high level</u></b> when a strategic path has been approved further work will be required by each service, however the report <b><u>Taunton Deane Borough Council Equalities Information Report 2013</u></b> gives a recent picture of the demographic that's so important when looking at Equalities.</p>
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## APPENDIX B

### **Profile of Taunton Deane**

The Borough of Taunton Deane is mainly rural and covers 462 sq km<sup>3</sup> of outstanding landscape, extending from the Somerset levels along the River Tone, with the Quantock Hills to the north and the Blackdown Hills to the south.

This year we benefit from the availability of the first releases of information gathered in the 2011 census. The population of Taunton Deane is given as 110,187 which is up by 7.7% on the 2001 census, in line with the rest of England (7.9%) but higher than the Somerset figure of 6.4%

Taunton Deane has a population density of 2.4 people per hectare, which is higher than the Somerseand South West rates of 1.5 and 2.2 respectively, but significantly lower than the rate for England of 4.1

The area of Taunton Deane Borough Council encompasses 50 parishes as well as unparished Taunton Town. Residents are represented at District Council level by 56 District Councillors. The district shares borders with West Somerset, Sedgemoor, South Somerset, East Devon and Mid Devon.

### **An overview of households**

There are 46,907 households, which continue to represent 20% of the Somerset total. Most people, 97% of the population, live in households and 3% (c 3,300) live in communal establishments, such as residential homes and barracks.

In 2011 there were 941 residents employed in the armed forces, 448 of whom were living in a household and 493 in a communal establishment such as the barracks at Norton Fitzwarren.

### **Population Pyramid - Taunton Deane – 2011 Census – TDBC Equalities Information Report 2013 page 6**

The diagram below shows the age-sex profile of Taunton Deane, with the oldest at the top, and men on the left, females on the right of a central axis.

The 2011 chart shows the impact of 'baby booms' of the immediate post-World War 2 period and the mid-1960s. These appear as mini bulges in the 45-49 and 60-64 age groups. This is also true nationally.



## APPENDIX B

The makeup of households within Taunton Deane are very similar to the average Somerset profile, with the highest proportion living alone (30.2%) followed by households where all residents are over 65 years. The table below shows the split.

	England and Wales	Somerset	Taunton Deane
One person household	30.2%	29.8%	30.2%
One person hous : Aged 65 and over	12.4%	14.8%	14.7%
Any type of household: All aged 65 and over	20.9%	26.3%	25.3%
Married/Civil p'ship couple household: No children	12.3%	15.2%	14.1%
Married/Civil p'ship couple household: With dependent children	15.2%	14.8%	15.6%
Married/Civil p'ship couple household:All children non-dependent	5.6%	5.3%	5.0%
Cohabiting couple household: No children	5.3%	5.3%	5.4%
Cohabiting couple household: With dependent children	4.1%	4.2%	3.9%
Cohabiting couple household: All children non-dependent	0.5%	0.5%	0.5%
Lone parent household: With dependent children	7.2%	5.6%	6.0%
Lone parent household: All children non-dependent	3.5%	2.8%	2.9%
Muti-person household: All full-time students	0.6%	0.0%	0.1%
Multi-person household: Other	7.3%	5.5%	5.9%

## APPENDIX B

The 2011 census considered migration as the number of years a person has lived in the UK. The results for Taunton Deane are included below: Taunton Deane	Somerset %		South West %	England %
Born in UK	92.9	94.0	92.3	86.6
Resident in UK: less than 2 years	0.9	0.7	1.0	1.7
Resident in UK: 2 years or more but less than 5 years	1.2	1.0	1.3	2.1
Resident in UK: 5 years or more but less than 10 years	1.6	1.2	1.5	2.8
Resident in UK: 10 years or more	3.3	3.0	3.8	6.8

### Age Information

Age range	Taunton Deane	Taunton Deane %	England %	South West	Somerset 2011	Somerset 2001
0-4	6,281	5.75	6.2	5.6	5.4	5.5
5-15	13,773	12.5	12.6	12	12.4	14
16-24	11,900	7.2	11.9	11.3	10.2	9.2
25-64	56,195	51.1	52.8	51.5	50.8	51.9
65-74	10,798	9.8	8.7	10.1	10.8	9.8
75 plus	11,239	10.2	7.8	9.5	10.2	9.6

## APPENDIX B

### **Carers - Somerset and Taunton Deane Profile**

The first reliable data on care giving was gathered in the Census 2001. The figures from the latest census are given below.

According to this over 58,000 people in Somerset provide unpaid care each week and over one-fifth were providing care for 50 hours per week. Within Taunton Deane there are over 11,600 carers and over 2,300 providing over 50 hours a week. All people who provide unpaid care	Taunton Deane %	2011 Somerset	England & Wales	2001 Somerset
Total carers	10.6	11.0%	10.3%	10.1%
1-19 hours a week	7.3	7.4%	6.5%	7.3%
20-49 hours a week	1.2	1.3%	1.4%	0.9%
50 or more hours a week	2.1	2.3%	2.4%	1.9%

### **How Taunton Deane will comply with the Equality Act (2010)**

See TDBC Equalities Information Report 2013 – Page 21

Corporate Flow Chart “Taunton Deanes response Equality Act (2012)

**APPENDIX B**

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**Section two – Conclusion drawn** about the impact of service/policy/function/change on different groups highlighting negative impact, unequal outcomes or missed opportunities for promoting equality

## APPENDIX B

Against the backdrop of the council's future financial vision Taunton Deane programme and its principles, and the recent customer access review lead by housing, it is evident that there is significant scope for performance improvement and cost effectiveness in customer access in Taunton Deane. The case is designed to describe the overall vision and provide an action plan for how that vision can become a reality.

Issues to customers will need to be considered by service, however it isn't at this stage considered that changes will adversely affect customers more likely to be a positive affect as services will be more readily available. Examples of these would be an up skilled customer services team, transactional technology for all to use. The ongoing project recognises vulnerable groups including those with protected rights under the Quality Act 2010

- **Age**

The current vision has no known issues arising for any age of person within the Community or Somerset wide; service lines will conduct a full EIA when reviewing the transformation requirements.

It is thought that the service will actually be improved and more accessible for all ages and help and support will be given by a fully skilled customer service team where face to face meetings can take place. Training will also be given by fully trained officers on the self servicer machines where required. Officer will also be able visit community hubs and take the service into peoples homes where travelling might be difficult.

Accessibility to our services will be reviewed in line with our vision and a customer travel plan looking at for example bus routes.

Looking at all ages and those caring for people of all ages the new ways of working through a transactional website for example means that our services are more accessible to the community. An example would be a carer not having time in the day to contact a particular service due to the pressures of the job when caring, the new ways of working would allow the service to be contact at more convenient time, outside of core hours.

## APPENDIX B

- ***Disability***

The new ways of working actually makes services more accessible to all members of the community and will not make accessing any service more difficult for a disabled person. The service will actually be designed for better taking into account the needs of disabled people by working with them in the actual design. Improvements such as

- Full wheel chair access to reception
- Wheel Chair access to private meeting rooms
- Charging point for mobility vehicles
- Interactive website where fonts can be changes, listening pages
- Hearing Loops in main area's plus meeting rooms and area Hubs
- Brail help cards – Advise and design will be discussed with local groups

These are just some examples and it is the intention of Taunton Deane to work with local groups helping to design service accessibility

- ***Gender Reassignment***

No impacts are known and TDBC embrace and recognise diversity within the community, all process and service transformation with be tested by each service by conducting a full EIA.

- ***Marriage and Civil Partnership***

No impacts are known and TDBC embrace and recognise diversity within the community, all process and service transformation with be tested by each service by conducting a full EIA.

## APPENDIX B

- ***Pregnancy and Maternity***

No impacts are known and TDBC embrace and recognise diversity within the community, all process and service transformation will be tested by each service by conducting a full EIA.

Local community hubs and services accessible via a fully transactional website will mean an improved service where the need to access a service can only be done outside of what could be considered to be core hours. Interactive telephone systems and web chat will also help service access. Face to Face contact is welcome and facilities such as a changing room would be available where the building/hub design allowed. Out of hour's visits could also be arranged virtually for example helping to bring then service to the customer.

- ***Race***

Each service would conduct a full EIA as part of the service transformation requirement, there are no known equality issues but all will be tested. Working with local groups recognising the five most common languages spoken within Taunton are, Polish, Portuguese, Bengali, Malayalam and Tagalog/Filipino, translation links via the website will help communication making the service aware of the need for help for none speaking customers.

Booking translators for meetings can be arranged as well as having multi lingual banners and pages on a fully transaction website. Face to Face assistance would be given helping the customer to develop life skills to help break down any language barrier. Documents can be requested in different languages upon request from a customer. Simple multi lingual telephone messages will help guide customers to the service they need.

Working closely with groups helping to design the service to meet their needs from the beginning will help get it right first time.

- ***Religion and Belief***

No impacts are known and TDBC embrace and recognise diversity within the community, all process and service transformation will be tested by each service by conducting a full EIA

## APPENDIX B

Developing a service to a multi cultural society and working with them on service delivery will bring religion and belief into each service lines EIA. All service delivery areas will be respectful to all.

- **Gender**

No impacts are known and TDBC embrace and recognise diversity within the community, all process and service transformation with be tested by each service by conducting a full EIA.

- **Sexual Orientation**

No impacts are known and TDBC embrace and recognise diversity within the community, all process and service transformation with be tested by each service by conducting a full EIA.

**I have concluded that there is/should be:**

No major change - no adverse equality impact identified	Agreed
Adjust the policy/decision/service	Each service line will review Equality's in the more detailed phase 2
Continue with the policy/decision/service	Agreed
Stop and remove the policy/decision/service	High level plans will continue

Reasons and documentation to support conclusions

High level Business Case to members  
 Customer Access Strategy  
 Accommodation Strategy

**Section four – Implementation – timescale for implementation**



## APPENDIX B

Phase one will be concluded after the 4<sup>th</sup> December working towards full Council 10 December 2013. Phase two will require detail from service lines and a full project team at which point an Equality expert will be asked to join the project team.

### Section Five – Sign off

Responsible officer	Management Team
Date	Date

### Section six – Publication and monitoring

Published on

Next review date

Date logged on Covalent

### Action Planning

The table should be completed with all actions identified to mitigate the effects concluded.

Actions table						
Service area				Date		
Identified issue drawn from your conclusions	Actions needed	Who is responsible?	By when?	How will this be monitored?	Expected outcomes from carrying out actions	

**APPENDIX B**