
Report To:	Policy & Resources Committee	Date:	18 September 2018
Report By:	Chief Financial Officer	Report No:	FIN/86/18/AP/FM
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Subject:	Customer Services Strategy/Annual Performance Update		

1.0 PURPOSE

- 1.1 The purpose of this report is to seek Committee approval for the 2018-21 Customer Services Strategy and resultant action plan as well as to provide the Committee with an update of Customer Service Centre (CSC) performance for 2017/18.

2.0 SUMMARY

- 2.1 Following the opening of the Customer Service Centre in the summer of 2012 the Policy & Resources Committee approved its first Customer Services Strategy in November 2012. This Strategy was refreshed in September 2015 and has now been further refreshed for 2018-21 and can be seen at Appendix 1 with the updated action plan at Appendix 2
- 2.2 Appendix 3 details progress against the action plan presented to the Committee in September 2017 and Appendix 4 provides performance information for 2017/18 as compared to 2016/17 in terms of volumes and throughput. Overall the level of performance has been fairly stable with only slight slippage in the Revenues and Benefits abandoned call rate. More information relating to performance can be seen at Section 6 of this report.
- 2.3 Section 7 of the report identifies targets for 2018/19 which are reported through the Corporate Directorate Improvement Plan and Inverclyde Performs. This section also outlines the challenges ahead including ongoing work to drive forward channel shift, the ongoing pressures of the Welfare Reform Agenda. It also highlights that Customer Services will be merging with Registration Services from April 2019 and how the Council plans to work with the new Scottish Social Security Agency.
- 2.4 Section 8 advises on positive results of a targeted survey of CSC users that was carried out in late 2017. This is largely supported by the results of a recent Citizens' Panel questionnaire which will be reported separately to Committee.

3.0 RECOMMENDATIONS

- 3.1 It is recommended that the Committee approves the 2018/21 Customer Services Strategy and associated Action Plan.
- 3.2 It is recommended that the Committee notes the positive progress made in continuing to deliver the CSC action plan and the plans for further improvement/development in 2018/21.
- 3.3 It is recommended that the Committee notes the ongoing impact of Welfare Reform changes, particularly Universal Credit (UC) including the new Scottish Social Security Agency, on the workload/service delivery within the Customer Service Centre.

Alan Puckrin
Chief Financial Officer

4.0 BACKGROUND

- 4.1 The Policy & Resources Committee approved its first Customer Services Strategy in November 2012 following the opening of the Customer Service Centre in Clyde Square. This Strategy was refreshed for 2015-2018 and is presented to the Committee on an annual basis together with the annual performance update.
- 4.2 When the CSC first opened in June 2012, Performance Information was basic and unreliable. A temporary Development Officer post was funded from the Modernisation Fund for 2 years and a series of performance reports which provided more robust information on performance in the CSC was developed. This post, which is now permanent, continues to provide valuable support in assisting the Customer Services Supervisor with Quality Monitoring and was pivotal in the development of a Customer Service customer survey.

5.0 2018/21 CUSTOMER SERVICES STRATEGY AND ACTION PLAN

- 5.1 The CSC Strategy continues to inform on key areas such as how the customer fits in with the Council's Priorities, how the Council engage with customers as well as detailing the journey and achievements since the Strategy was last refreshed in 2015. The new Strategy includes the plan for the way forward including how the Council in partnership with ICT and the Digital Access Strategy plans to roll out more channel shift opportunities.
- 5.2 The Action Plan which can be seen at Appendix 2 has been updated and actions previously reported as complete have been removed from the plan.

3 new actions have been added which are:

- British Sign Language Plan 2018-23, Support Corporate Policy with the implementation.
- Transfer of Registration Services to Customer Services.
- Keep abreast of developments in relation to the Scottish Social Security Agency.

- 5.3 The action plan that was presented to the Committee in September 2017 has been updated; appendix 3 refers and shows:
 - 8 x Blue (completed) actions.
 - 5 x Green (on-track) actions.
 - There are no amber actions.

6.0 2017/18 PERFORMANCE

- 6.1 Appendix 4 contains a comparison of performance for Revenues & Benefits (R&B) enquiries for 2017/18 against the same period for 2016/17 for telephony, customers interviewed and incoming emails. The Management Information (MI) illustrates that call volumes have reduced by 13% with the abandoned call levels increasing slightly from 23% in 2016/17 to 25% in 2017/18. Whilst this performance falls short of the target of 20%, it has to be taken into consideration that for approximately 8 months of the year, the R&B team operated with 2 fewer Advisors due to vacancies. R&B phone calls are complex and increasingly more so due to Universal Credit and it is credible that the team delivered this level of performance.
- 6.2 The average time that customers had to wait for their call to be answered remained static for 2017/18 at just over two minutes. The number of customers interviewed decreased by 12% which was due to the roll out of Universal Credit. Email contact to the R&B team has also decreased by 26% which again is largely contributed due to the roll out of UC. The total contacts to the R&B team are expected to reduce further year on year as the Housing Benefit caseload drops until the full migration of Housing Benefit to UC which is due by 2023.

- 6.3 Appendix 4 also contains a comparison of performance for Other Council Services from 1 April 2017 to 31 March 2018. This shows that the abandoned call level has remained static at 7% which is in line with target. The number of overall calls presented has dropped slightly by 5%. Emails for general enquires decreased by 11% and total contact for general enquires reduced by 6%; these reductions are likely to be attributed in part to the fact that a total of 2197 enquires last year were submitted via the mobile app and website that normally would have been handled by a CSC.
- 6.4 Targets were set for the CSC for 2017/18 in respect of volumes of complaints and compliments; the target was based on the outturn for 2016/17. A target was subsequently set for 2017/18 that the CSC was to receive no more than 35 complaints and to receive in excess of 63 compliments. The outturn for 2017/18 was that 14 complaints and 81 compliments were received. This is testament to the knowledge and professionalism of the CS staff which is further evidenced by the results of the CS survey described at paragraph 8.2.
- 6.5 Whilst the number of customers using electronic means of contact such as the mobile app remains small it is encouraging to see the total contacts through the CSC are reducing. The developments underway outlined in the CSC Strategy and associated action plan as well as the Digital Strategy such as expanding the range of services that can be accessed on line and the roll out of MyAccount should help drive the shift to more digital channels.
- 6.6 It was reported to the Committee in September 2016 that a Quality Monitoring System had been purchased which, as well as giving the opportunity for senior staff to provide feedback to the advisers for development purposes, aimed to reduce the abandoned call level due to more efficient call handling. The system however has been subject to technical issues which not only delayed implementation but has had an impact on the effectiveness of its usage as well as creating a resource issue for the Customer Services Supervisor. The Revenues and Customer Service Manager and ICT Manager keep the Chief Financial Officer informed of key issues and if there continues to be issues with the current supplier then an alternate system may require to be procured.
- 6.7 The late opening on a Wednesday morning continues to be of benefit for staff training and development.

7.0 FUTURE PLANS AND TARGETS

- 7.1 Customer Services targets for 2018/19 have been agreed as:
- To have fewer than 20% abandoned R&B telephone calls – no change from last year.
 - To have fewer than 7% abandoned general calls – no change from last year.
 - To receive no more than 20 complaints – 14 were received in 2017/18 compared to 38 received in 2016/17.
 - To receive in excess of 63 compliments – 81 were received in 2017/18 compared to 58 in 2016/17.
- 7.2 As noted earlier in this report and accompanying CSC Strategy, Channel Shift continues to be a key priority and the following actions will help facilitate this:
- Work with suppliers to fully enable the ability of customers to book and pay for calendared and transactional services such as bulky uplifts.
 - Enhance the range of services available via Web Self-service, including integration of MyAccount authentication which would allow one secure sign in.
 - Review and revise the range of services available via the Inverclyde Online smartphone 'app and continue to improve back end processes and more widely promote this channel of contact.
 - Work with suppliers to enable Council Tax account administration such as reporting changes in circumstances via the Council web site.

- 7.3 Progress on the above actions is monitored through the Channel Shift Group which is chaired by the Chief Financial Officer and is also tracked through the Digital Strategy Action Plan as well as the Customer Service Action Plan. These projects are scheduled to be complete by the end of this year provided the implementation phase and testing go as planned.
- 7.4 As reported in Section 6, the Quality Monitoring system is now live and a percentage of calls are listened into by the Senior Customer Service Advisors (SCSR). A scoring matrix is applied to give an overall score for each advisor. Templates have been developed for each of the key areas and for the key services. The elements that are scored on will vary depending on the service however the following summarises the key areas that are scored:
- Did the CSR apply the correct greeting and offer further assistance at the end of the call?
 - Did they apply the standard verification protocols?
 - Did they access the correct record?
 - Did they sound friendly, polite and interested in helping?
 - Did they deploy effective listening and effective questioning skills to gather further information avoiding the use of jargon?
 - Was the customer given correct advice, guidance and/or issued the correct forms as appropriate?
 - Were the appropriate systems updated?
 - Were the correct procedures followed when transferring a call?
- 7.5 Various parameters can also be monitored such as handling times of calls over or under certain duration. The Senior CSR provide one to one feedback to the CSR on their performance and ensure that feedback is positive where merited as well as highlighting areas where improvements can be made.
- 7.6 The quality assessment of telephone calls is broken down into four areas: Revenue & Benefits, Environmental & Public Protection, Taking a Payment and Switchboard calls. These four areas look for different outcomes and are assessed independently of each other. The results for 2017/18 showed a high performing team with the following accuracy results:
- Revenue & Benefits – 81%
 - Environmental & Public Protection – 87%
 - Taking a Payment – 90%
 - Switchboard – 90%
- 7.7 The CSC has continued to enjoy successful outcomes through the placement of Modern Apprentices (MA). Working in the CSC gives young adults a wealth of experience as well as confidence through dealing with different types of customers on the telephone and face to face. The CSC has proven history of developing MA enhancing their employment opportunities within and external to the Council. In 2016/17, 2 former MA obtained permanent positions out with the Council and in 2017 one MA secured a temporary position within the CSC. As well as it being of great benefit for the individuals securing employment following the training and mentoring they receive during the MA process, the CSR and senior CSR are delighted to see results of their investment.
- 7.8 Welfare Reform is having an impact on the volume and nature of contacts with the Customer Service Centre. The pace of this change will increase over coming years as Universal Credit continues to roll out and the migration of Housing Benefit to UC. This will undoubtedly have an effect on performance in the R&B team and will be closely monitored and reported to the Chief Financial Officer.
- 7.9 In April 2019, following a restructure in Revenues and Customer Services and the planned retirement of the current Revenues Supervisor, Registration Services are being merged with the CSC and the Senior Registrar will report to the Customer Services Team Leader with the current Benefits and Customer Services Team Leader taking on responsibility for Revenues. Plans are in place for skills transfer.

- 7.10 When the appropriate systems are in place, Customer Service staff will be trained in taking registration telephone calls for customers wishing to make appointments, allowing the registration staff to concentrate on delivering the service. It is critical that this training is thorough due to the sensitivities and legislative requirements of registering births, deaths and marriages. The training will be delivered in modules with births being first, followed by marriages and then death appointments.
- 7.11 Following Royal Assent of the Scotland Act 2016 in March 2016, the Scottish Social Security Agency (SSSA) was set up to deliver 11 Social Security Benefits which have been devolved to Scotland to deliver and which are currently administered by the UK Government. The timescales for the delivery of the devolved Benefits will begin with the top up to Carer's Allowance from summer 2018, Best Start Allowance then Funeral payments during 2019 with a phased roll out of the remaining benefits for full implementation by 2021.
- 7.12 The SSSA intend to employ staff locally and envisage them working within every local authority area; recruitment is likely to begin in 2019. Rather than replace local delivery arrangements, Scottish Government officials wish to build on what already exists through augmentation and support and acknowledge that partnership arrangements will be key to the new arrangements. Progress in this area will be monitored through the CSC Action Plan and with regular meetings with the SSSA and internal services in the Council.
- 7.13 The British Sign Language (Scotland) Act 2015 requires Councils to develop a British Sign Language Plan (BSL) for 2018/23; the deadline for the publication on the Plan is 1 October 2018. The Head of OD, Policy and Communications will submit the final draft of the Councils BSL plan to the Policy and Resources Committee in November 2018. Customer Services will play a large part in contributing to actions within the plan to ensure the best service possible for BSL users; progress will be monitored through the CSC refreshed action plan

8.0 CUSTOMER CONSULTATION

- 8.1 A targeted survey of 226 CSC users was carried out in late 2017 which started by asking what service and by what channel the customer contacted the CSC about, followed by a range of questions designed to ascertain how happy or otherwise customers were about waiting times to speak to a member of staff, how knowledgeable, professional and helpful the staff member was, as well as establishing how satisfied or otherwise the customer was with the final outcome and overall service received. The questions were on a scale of 1 - 5 from agree to disagree and very satisfied to very dissatisfied with the option to say if not appropriate. Free type space was provided to allow for customers to add comments as to why they disagreed or felt dissatisfied. This qualitative information will be useful when forward planning. At the end of the survey customers were asked "What did we do that impressed you most?" and "what could we do better next time?".
- 8.2 The results were most encouraging in that 97% of service users said that they were very satisfied or satisfied with the knowledge of the CSRs, their helpfulness, speed of response and level of courtesy. No area on the survey received a score of less than 80% which is commendable. In the 'free type' areas the comments received indicated that some work is required relating to back end processes relating to how and when requested services are carried out and how customers are communicated with regarding their requests; that said, it should be noted that the scores in the overall service and the final outcome scored 89.4% and 97.4% respectively and therefore are not indicative of a poor service.
- 8.3 The results of the Citizens/ Panels that was carried out in the Spring of this year are currently being analysed. It is anticipated that these results will provide a similar position to that of the CSC targeted survey; the full results will be reported in detail to the Committee.

9.0 IMPLICATIONS

9.1 Finance

Financial Implications: There are no financial implications arising from this report

One off Costs

Cost Centre	Budget Heading	Budget Years	Proposed Spend this Report £000	Virement From	Other Comments
N/A					

Annually Recurring Costs/ (Savings)

Cost Centre	Budget Heading	With Effect from	Annual Net Impact £000	Virement From (if Applicable)	Other Comments
N/A					

9.2 Legal

There are no legal implications arising from this report.

9.3 Human Resources

There are no direct HR implications arising from this report.

9.4 Equalities

There was a full equalities impact assessment carried out with the initial Strategy and this has been updated as part of the refreshed CS Strategy.

Has an Equality Impact Assessment been carried out?

<input checked="" type="checkbox"/>	Yes	See attached appendix
<input type="checkbox"/>	No	This report does not introduce a new policy, function or strategy or recommend a change to an existing policy, function or strategy. Therefore, no Equality Impact Assessment is required.

9.5 Repopulation

The provision of quality Customer Services to existing residents and potential residents plays a part in the retention and attraction of people to Inverclyde.

10.0 CONSULTATIONS

10.1 As this is a refresh of the existing Strategy, no specific consultation were undertaken.

11.0 LIST OF BACKGROUND PAPERS

11.1 None

Inverclyde council

Customer Services Strategy 2018- 2021



Getting it right for Every Child, Citizen and Community'

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1.0 Foreword

- 1.1 Inverclyde Council continues to be committed to delivering excellent Customer Service. The first Customer Service Strategy (CSS) was presented to the Policy and Resources Committee in November 2012 with a refreshed Strategy presented in September 2015. This document further refreshes that strategy, looking forward from the current time until 2021 and advises how the Strategy plans to develop as well as reporting on the service developments since the last Strategy was presented. The CSS and associated action plan are organic documents that will develop and evolve as required in order to meet the needs and demands of our community and therefore supporting the achievement of the Councils vision to “Get it right for every Child, Citizen and Community”. The CSS and how it works operationally continues to be intrinsically linked with ICT, Corporate Communications and the Digital Access Strategy.
- 1.2 In general, customer expectations continue to increase as the knowledge and availability of digital channels becomes more common. There is a demand for faster, easier contact as ways of working and communicating are changing the way individuals lead their lives. Citizens however, sometimes have low expectations or opinion on services provided by local government. It is therefore crucial that going forward the Council needs to ensure that the move towards channel shift is efficient and encourages customers to not only ‘try’ but continue to use more efficient channels of contact. This has become more important following result from a recent citizens panel survey more detail of which can be seen later on in this document.
- 1.3 It is also important to understand citizen’s access to technology, the type and complexity of the contact, their personal preferences as well as their skill sets when selecting channels of contact. This is particularly relevant to Inverclyde Council given the levels of deprivation and vulnerability and it must be accepted that face to face and telephony service provision will be a necessity for the foreseeable future regardless of the range of digital channels made available.
- 1.4 The key aims of this Customer Service Strategy are:
- Putting customers at the heart of all we do
 - Serving the customer well by providing a modern responsive service
 - Clear customer commitment
 - Clear customer service values that underpin all we do
 - Protecting frontline services by ensuring better value for money
 - Work closely with our internal and external partners and key stakeholders to provide an efficient and effective service
 - Flexibility to allow the Strategy to develop as different opportunities and challenges such as those experienced from Welfare Reform arise

2.0 How Customer Services fits with the Council's Priorities

2.1 Inverclyde Council has developed a “**Nurturing Inverclyde**” approach that has been rolled out across all services to help achieve its vision. The Council has developed this approach through adapting the wellbeing outcomes that are used in the ‘Getting it right for Every Child Model’ to suit the needs of all Council Services. The wellbeing outcomes that the Council uses are:

- Safe
- Healthy
- Achieving
- Nurtured
- Active
- Respected
- Responsible
- Included

The Corporate Plan 2018/22 sets out the outcomes that the Council will seek to improve, which should in turn improve the wellbeing and quality of life of local residents, with a particular focus on reducing inequality and poverty. The Inverclyde Alliance also recognises that working with communities is fundamental to the successful delivery of its priorities and that communities themselves often have the answers to the problems experienced by those living in their areas. Similarly, local people are at the heart of everything the Customer Services Strategy aims to achieve. Customer Services link local people with the services they require, which can help them to achieve better outcomes.

The Customer Services Strategy will support delivery of the Council's Corporate Plan 2018/22 and in particular the following Organisational Priorities:

- to deliver services that are responsive to community needs and underpinned by a culture of innovation, continuous improvement and effective management of resources; and
- to develop motivated, trained and qualified employees who deliver quality services that meet current and anticipated service needs.

2.2 The Customer Service Strategy is aligned to the Council's Digital Access Strategy as much of the work is interlinked. How the Council's approach to Customer Service develops will significantly depend on investment in systems and processes which make access to information faster, easier and more effective. Currently Customer Services is a key partner in the development of channel shift opportunities and the web site both of which are core to the Councils Digital Access Strategy.

2.3 Changes brought about as a direct result of Welfare Reform have resulted in challenges for many residents of Inverclyde and the CSC will have initial contact with many affected individuals and families. It is therefore vital that the CSC has close working links with the Benefits Service, Health and Social Care Partnership (HSCP) and other key partners to ensure that as far as possible the needs of residents are met. Provisions are in place for customers to access help with online applications as well as Personal Budgeting Support. The Chief Financial Officer chairs the Welfare Reform Project Board, and is supported by the Revenues & Customer Services Manager who will ensure that any Welfare Reform issues are taken forward.

3.0 Engaging our Customers

- 3.1 It is important to define what excellent customer service looks like and while this may be difficult to define, the following attributes will contribute towards meeting this objective:
- **Accessible** – locations and times which meet our customers' needs
 - **Relevant** – services that are fit for purpose, joined up and minimise potential barriers
 - **Inclusive** – all customers are treated equally and fairly and customer feedback is acted upon
 - **High Quality and Efficient** – reliable flexible and responsive services which are continually improved and delivered cost effectively
 - **Empowered and Effective staff** – ensuring our workforce has the appropriate skills, tools and authority to effectively deliver quality services.
- 3.2 A commitment to excellence in customer services must be an integral part of the organisational culture at all levels. It is a 'Golden Thread' that starts with the Corporate Plan, then Directorate Plans, Service Level Agreements with internal stakeholders and ultimately through an effective appraisal process for all staff with appropriate training and development that achievement of this goal will be evidenced.
- 3.3 The 2015-17 CSC Strategy acknowledged that whilst the Citizens Panel is a valuable source of information many of the residents it reaches have not made contact with the CSC and recommended that a more targeted survey be carried out with customers who have had contact of some kind with the CSC. A Targeted survey of 226 CSC users was conducted in late 2017 which asked users a range of questions relating to response times for channels of contact, satisfaction with the final outcome and the overall service and quality of service from the CSR. The results showed that 97% of service users were very satisfied or satisfied with the knowledge of the CSR, their helpfulness, speed of response and level of courtesy. No area on the survey received a score of less than 80% which is commendable. In each of the questions, Respondents were encouraged to leave comments about their experience and it is clear that some work is required relating to back end processes relating to how and when requested services are carried out and how customers are communicated with regarding their requests. In order to further improve the scores for overall service and the final outcome, work will continue through the service level agreements and ongoing communication with the relevant services. Work is also required to further reduce waiting times for Revenues and Benefits calls.
- 3.4 Results from a Citizens Panel that was carried out in the spring of 2018 are currently being analysed; it is anticipated that these results will provide a similar positive position to that explained in the above paragraph in respect of the targeted survey. The Citizens Panel survey also asked questions around citizens understanding of and willingness to use electronic means of contact rather than the traditional ones of telephone and face to face contact. This will help inform the progression of the Digital Strategy.

- 3.5 The Equality Duty ensures that all public bodies play their part in making society fairer by tackling discrimination and providing equality of opportunity for all. Inverclyde Council aims to take into consideration the impact that race, gender and transgender, disability, age, sexual orientation and religion or belief may have on accessibility and the way it delivers customer services. An Equalities Impact Assessment (EIA) was carried out when the 2012-15 CS Strategy was produced and has been updated as part of this refreshed Strategy.

4.0 Our Values and Commitment

- 4.1 The Council's Customer Charter sets out our values and behaviours and what we in turn expect from our customers. This Charter was approved by Policy and Resources Committee in August 2015 and is publicly displayed in the CSC.

5.0 The CSC journey and achievements 2015-2018

5.1 Since the CSC opened in Clyde Square in May 2012 the range of Services provided have grown and now deliver:

- Environmental Services enquiries
 - Safer Community enquiries
 - Cash collection
 - Switchboard calls
 - Council Tax enquiries
 - Housing Benefit enquiries
 - Mail Room including Revenues & Benefits mail
 - Copying evidence for Benefit claims etc.
 - Scanning and indexing Revenue & Benefits mail
 - Petty cash reimbursement, Licencing, issuing and receipt of licenses including payments
 - Corporate reception desk
 - Free school meals, Clothing Grants and EMAs - Issuing of forms checking completed forms and accepting supporting evidence including answering basic enquiries
 - Collection of paperwork from a number of sources including ASN auxiliary paperwork, taxi driver badges, tenders and acting as a reception filter for Education enquiries following the opening of the new Education HQ
 - Dealing with Scottish Welfare Fund customers
-
- Joint working with Soldiers, Sailors, Airmen Families Association (SSAFA) referrals and liaising with the Veteran Support Advisor, assisting Renfrewshire Valuation Joint Board help complete online registrations since the last strategy, 11 further services can be paid for on line.

5.2 Service Level Agreements (SLA) are in place to monitor the effectiveness of the service provided by the CSC as well as back end processes of the services themselves. The SLA will be updated as the digital strategy changes service provision.

5.3 When the 2012-15 CSS was presented to Policy and Resources Committee it contained an action plan for tasks to be taken forward. Appendix 2 details the new Action Plan.

5.4 Registrar Services moved to the Customer Service Centre in 2013 from West Stewart Street and whilst initially the Registrars largely operated independently of the rest of the Customer Service Centre this has since developed into much closer working. In 2017 the corporate reception desk and the first point of contact for Registrars customers have merged, which helped facilitate a budget saving as well as allowing Registrars staff use their time to concentrate on the professional aspect of the role and at the same time giving the CSR who cover the corporate reception desk a wider remit. Further integration is planned for 2019 following a recent management restructure.

- 5.5 The 2015-17 CSC Strategy advised that Inverclyde Council had formed a partnership with Renfrewshire and East Renfrewshire Council's. This partnership developed a pathway to Council and HSCP services for veterans, serving armed forces personnel including reservists, and their families now living, working in, or wishing to relocate to the South Clyde area. The project progressed the Councils' commitment to the Armed Forces Community Covenant ensuring those who have served or are serving are not disadvantaged in civilian life because of their commitment and contribution to their country.
- 5.6 Customer service representatives and frontline staff across the Council, HSCP and the third sector have received training relating to the services offered enabling referrals to be made to the Veterans Support Advisor ensuring that veterans receive pension and compensation payments they are entitled to.
- 5.7 The establishment of a Veterans Support Operational Group has raised awareness within service areas of the challenges faced by this community and the opportunities available to support them. In October 2017, Inverclyde Council was named as one of 33 employers in the United Kingdom to achieve the Ministry of Defense Employer Recognition Scheme Gold Status with the Customer Service access point being an important aspect of the submission. A plaque marking this achievement is displayed in the CSC.

6.0 CSC Performance 2015 – 2018

6.1 In the period since the last Strategy calls presented to the CSC for services other than Revenues and Benefits (R&B) have remained fairly static with a slight reduction by 5% in 2017/18. It is hoped that as more channel shift opportunities are available and with appropriate marketing of other channels, the number of general calls presented will reduce. The level of non R&B calls answered against those presented has improved from 10% in 2014/15 to 7% in 2017/18 which is in line with internal targets.

6.2 The last CSC Strategy reported a significant increase in Revenues and Benefits interviews and telephone calls predominately due to Welfare Reform changes and Management Information (MI) at that time showed that 48% of R&B calls presented were not answered. Due to the roll out of Universal Credit and the subsequent reduction in the Housing Benefit caseload, the number of calls presented for R&B in 2017/18 reduced by 13% and R&B interviews decreased by 12%. Despite the reduction in calls presented, enquires continue to be complex and interviews and telephone calls take on average four times longer to handle than enquires for other services. MI shows that performance in this area is improved and the calls presented and not answered have reduced to 25% which whilst an improvement requires further progress. The increase in performance is largely due to a range of measures approved by CMT and Policy and Resources Committee in 2015 which included:

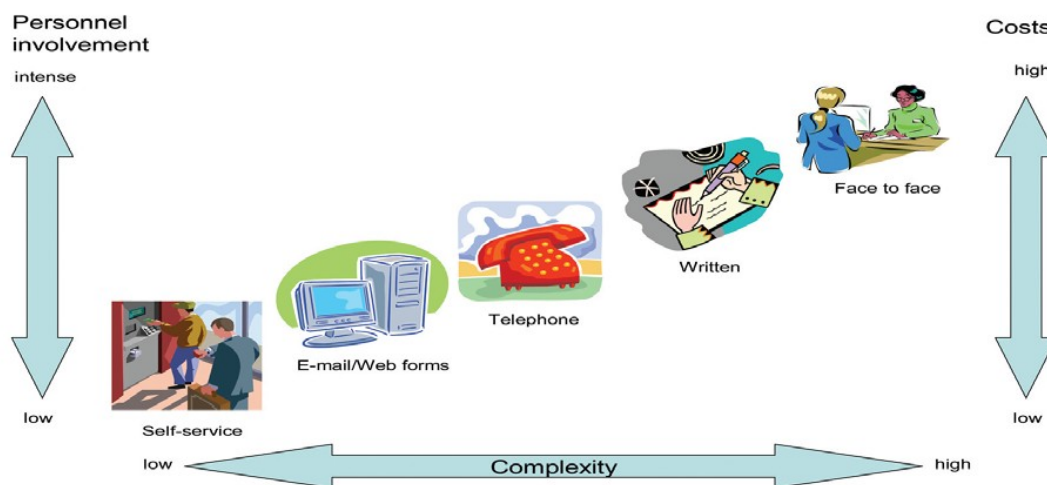
- Creation of a permanent Customer Services Support Officer to monitor and improve quality.
- A dedicated team of Revenues and Benefits Advisors at a higher grade has been created that will allow for specialism in a complex area as well as providing development opportunities for Customer Service Representatives.
- Appointment of temporary resource including utilising the Modern Apprenticeship Scheme
- Changing the opening hours of the CSC on a Wednesday from 08.45 to 11.00 to allow staff training and development.

6.3 A performance report is reported to Policy and Resources Committee on an annual basis following the summer recess; this report contains comparison statistics on the speed of answering telephone calls, wait times for face to face interviews as well as the percentage of presented calls that are not answered. The volume of contact by all channels is monitored and reported on as is performance against the action plan. The level of abandoned calls are also reported in the CDIP and Inverclyde Performs and in 2017/18 two new targets were added which report on the volume of complaints and compliments received

7.0 Customer Service and Digital Access – Developments since the 2015 Strategy

- 7.1 At a time when the Council continues to face challenging budget restrictions it is more important than ever that we concentrate our resources on providing services that our customers need and ensure that our delivery channels not only meet customer demand but are delivered in the most cost efficient way.
- 7.2 The 3 current primary methods of contacting the Council are by telephone, face to face and by email. The diagram below illustrates the options available for customer contact:

Delivery Methods - Analysis of Options



- 7.3 As can be seen above, the most cost effective way of providing access is through self-service electronic delivery whilst the most costly is by way of face to face interaction. This is the primary driver for the Digital Access Strategy which aims to facilitate an increase in self-service leading to customer satisfaction and efficiencies in resources and processes which is frequently referred to as 'Channel Shift'. We must not however lose sight of the fact that those in most need of face to face communication are often the most vulnerable and disadvantaged in our community and this must be a consideration moving forward.
- 7.4 We must also when marketing Channel Shift take into consideration the findings of the 2018 citizens panel where it was found that certainly those residents who were contacted and responded to the survey are not all clamouring for change in terms of moving from face to face and telephone contact. We need to make sure that new channels of contact are efficient and as simple as possible to encourage residents to not only 'try' the new electronic methods of contact but to keep doing so and spread the word to friends and family in a positive way. It is likely that significant engagement with our customers would be required to encourage the use of new or alternate channels.
- 7.5 The Chief Financial Officer chairs the Channel Shift Group with the remit of coordinating the Digital Strategy. The ICT Manager reports on performance and progress against the Digital Strategy Action Plan at every alternate Policy and Resources Committee.

7.6 A mobile application was launched in December 2016 which allows residents to request services and report a variety of issues directly to the service using their mobile phone provided it has 'smart' phone capability which takes advantage of inbuilt functionality such as camera and GPS location which in turn provides more accurate data for service areas. The areas that can be reported through these channels are:

- Abandoned vehicles
- Dog Fouling
- Graffiti
- Illegal Dumping and fly tipping
- Potholes
- Roads and Footpaths
- Rubbish collection/litter street lights/traffic lights
- Street cleaning

7.7 A new web channel called 'My Inverclyde' has been developed and is now live on the Councils website. My Inverclyde is an information data base displaying information that is most commonly requested by members of the public. This new channel solution allows all users to interrogate multiple geographical data and returns personalised search results based on an individual's postcode on information such as public transport nearest to their home, who their councilors are, refuse collections/recycling, school catchment areas and a host of other information. The information is presented in an easy to interpret manner and allows a user to retrieve information quickly and easily and means they don't have to interpret a map at all. It is hoped that publicity around this channel will lead to a reduction in non R&B telephone calls to the CSC.

8.0 Future Plans to develop Digital access for the CSC

- 8.1 The Service together with ICT has a number of key actions which form part of the Digital Strategy Action Plan (2017-2020). These actions aim to encourage our customers to move away from the more expensive channels of contact as well as allowing our systems to be 'smarter' and change the on line process. These being:
- a. Increase the services that are currently available to customers through the Customer Relation Management System (CRM) allowing citizens to access multiple services on line which will automatically classify and direct the case to the appropriate service therefore cutting out the requirement for intervention by a CSR and reduce notification time to the service.
 - b. Upgrade the on line booking service which will allow customers to book and pay for diarised services rather than having to go through the Customer Service Centre and therefore be able to select services such as a bulky uplift or wasp nest removal on line by selecting an appropriate date on a calendar for the uplift and make payment
 - c. Implement the Northgate self-service Portal which will allow customers to view and make changes in their circumstances such as changes of address to their council tax via the Councils website.
 - d. Roll out MyAccount, the Scottish Government Authentication Service which is a secure sign in service provided by the Improvement Service for on-line public services in Scotland. It provides people living in Scotland with the ability to set up an on-line account and, to use that account using a single user name and password to access a range of on-line public services provided by Councils, the NHS, Scottish Government and other public bodies. Levels of authentication and verification will be required to ensure security of identity before an account can be created.
 - e. Expansion of the provision of self-service access via Branch Libraries whilst also providing support for those requiring digital access and support arising from the Welfare Reform changes.
- 8.2 Whilst there is a strong drive to increase the number of services on line in order to modernise and meet customer demand, this need needs to balance potential risk against user experience and security of identity verification. The results of the Citizens Panels and targeted surveys will continue to provide valuable information into the channels of service our citizens expect

9.0 Other future developments

- 9.1 The CSC, in partnership with ICT and other relevant stakeholders has a challenging journey ahead to deliver results with regard to Channel Shift and continuing to improve performance, in answering presented calls and keeping knowledge up to date with Welfare Reform Changes as Welfare Reform changes are rolled out. All of this is continues to be against a backdrop of budget reductions and pressures and therefore more than ever there is a requirement to drive out efficiencies.
- 9.2 In April 2019, following a restructure in Revenues and Customer Services and the retirement of the current Revenues Supervisor, Registration Services is being merged with the CSC and the Senior Registrar will report to the Customer Services Team Leader with the current Benefits and Customer Services Team Leader taking on responsibility for Revenues. New job descriptions and Person Specifications have been completed and plans are in place for skills transfer.
- 9.3 When the appropriate systems are in place, CSR;s will be trained in taking registration telephone calls for customers wishing to make appointments, allowing the registration staff to concentrate on delivering the service. It is critical that this training is thorough due to the sensitivities and legislative requirements of registering births, deaths and marriages. The training will be delivered in modules with births being first, followed by marriages and then death appointments.
- 9.4 The Scottish Social Security Agency (SSSA) has been set up to deliver ? Social Security Benefits which have been devolved to Scotland which are currently delivered by the UK Government. The timescales for the delivery of the devolved Benefits will begin with the top up to Carer's Allowance from summer 2018, Best Start Allowance then Funeral payments during 2019 with a phased roll out of the remaining benefits for full implementation by 2021.
- 9.5 The SSSA intend to employ staff locally and envisage them working within every local authority area; recruitment is likely to begin in 2019. Rather than replace local delivery arrangements Scottish Government officials wish to build on what already exists through augmentation and support and acknowledge that partnership arrangements will be key to the new arrangements.
- 9.6 The British Sign Language (Scotland) Act 2015 requires Councils to develop a British Sign Language (BSL) Plan for 2018/23; the deadline for the publication on the Plan is 1 October 2018. The Head of the Councils OD, Policy and Communications will submit the final draft of the Councils BSL plan to Policy and Resources Committee in September 2018. Customer Services will play a large part in contributing to actions within the plan to ensure the best service possible for BSL users. Progress will be monitored through the CSC action plan.
- 9.7 In order to manage the ongoing development of the CSC the current action plan has been updated to reflect new actions which reflect the challenges ahead for the CSC. The action plan is split into the following areas:
- **People** – this will focus on training and development for staff and supporting Customer Service Representatives achieve SVQ's in customer service leading to improvement in performance and delivering on its priorities.
 - **Performance** – this will ensure that targets are set and that performance is monitored and reported in line with the action plan.

- **Customer engagement** – consultation with our customers and developing an action plan from the findings will help us manage customer expectations. The CSC will work with Corporate Communications assisting services with the implementation of the revised corporate Complaints Policy as well as with web site related issues.
- **Service development** – this is a wide ranging area that covers everything from how we will implement the Digital Access Strategy to reviewing opportunities for the single assessment for free school meals as well as progressing with the Customer First agenda. Underpinning all of this will be the ongoing effect of Universal Credit on Customer Services as well as its potential role in delivering Local Support Services for customers making claims for or in receipt of Universal Credit.

10.0 Reviewing this Strategy

- 10.1 The future for the CSC continues to be challenging and during the life of this 3 year strategy the big issues of promoting and implementing the Digital Agenda, the restructure of Registration Service and continuing to manage the Welfare Reform Agenda will all be pivotal in shaping how the CSC develops. An annual report on performance will continue to be presented to the Policy and Resources Committee and the Chief Financial Officer will receive regular updates on performance against the action plan.

- 10.2 Key actions from the Strategy will also continue be incorporated within the Environment, Regeneration & Resources Corporate Directorate Improvement Plan and monitored via the Channel Shift Group.

2018/21 Customer Services Strategy - Action Plan

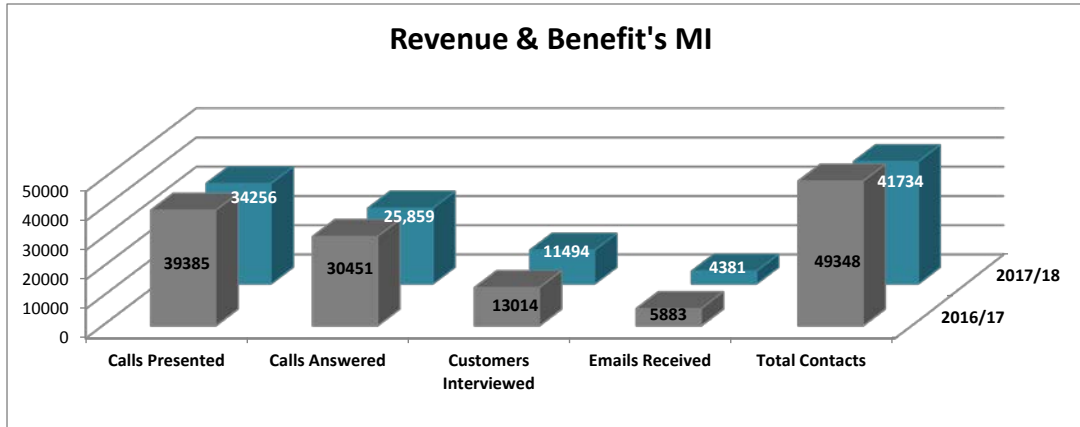
Action	Action	Success Criteria	Target Date	Responsibility	Position Aug 2018	Status
PEOPLE	Training needs will be identified from quality checking and appraisals	Training programme in place Better trained and confident staff. Better customer satisfaction Completion of CSPQ Staff understand expectations allowing resources to be correctly targeted. Service delivery meets management expectations Customer Service visions and outcomes are agreed	On-going	CS Supervisor/CS Support Officer	14 CSC staff have completed or are in the process of completing their CSPQ	GREEN
	British Sign Language plan 2018 - 2023. Support Corporate Policy with the implementation	Meeting objectives in plan Better customer satisfaction	Oct '18	Corporate Policy Team/CS Supervisor	Consultation stage	GREEN
	Transfer of Registration Services to Customer Services	(1)JD/PS for CS Supervisor to be developed and sent to job evaluation. (2)Knowledge transfer of operational processes and legislation	(1) End Aug '18 (2) Aug '8 - Apr '19	(1) Revenues & CS Manager (2) CS Supervisor/Principal Benefits and Customer Services Officer	Ongoing	GREEN
	Keep abreast of developemnts in relation to the Scottish Social Security Agency (SSSA)	Joint working with the SSSA and internal servies such as HSCP, exporing co location opportunities	Ongoing	Revenues and Customer Services Manager/CFO	ongoing	GREEN
PERFORMANCE	Agree escalation process where individuals repeatedly fail to meet required standards.	Improved customer service delivery Improvement in scoring of individual's quality managed calls	On-going	Customer Services Supervisor/Support Officer	ongoing	GREEN
CUSTOMER ENGAGEMENT	Use the website to communicate meaningful information to our citizens. Feed issues into the Corporate Web Group	Customer satisfaction improvements - customer expectations are managed better when targets are understood.	On-going	Revenues & Customer Service Manager/Corporate Communications	On Going My Inverclyde is now live on the website	GREEN
SERVICE DEVELOPMENT	*Develop Kana system *Implementation of web self service *Mapping integration for location based fault reporting with corporate GIS system *Develop further online payments *Revise the range of services available via the council website *Development of citizen access for council tax	*Increased range of services available via Web Self Service *Customers are able to book and pay for services online *Customers are able to conduct council tax administrative requests via the council website *Customers can access multiple services via a single sign on (MyAccount) *Reduces workload for customer services *Streamlines processes *Quicker service notification of new/updates to cases	Mar-19	Revenues & Customer Services Manager & ICT	Ongoing: GIS has still to be incorporated for use by Customer Service staff and relevant systems to be fully tested and implemented Project team is in place and engaging with suppliers to implement	GREEN

2015/18 Customer Services Strategy - Action Plan

Action	Action	Success Criteria	Target Date	Responsibility	Position Aug 18	Status
PEOPLE	Training needs will be identified from quality checking and appraisals	Training programme in place Better trained and confident staff. Better customer satisfaction Completion of CSPQ Staff understand expectations allowing resources to be correctly targeted. Service delivery meets management expectations Customer Service visions and outcomes are agreed	On-going	CS Supervisor/CS Support Officer	11 CSC staff have completed or are in the process of completing their CSPQ	GREEN
PERFORMANCE	Implement quality management templates and frequency of review. Agree escalation process where individuals repeatedly fail to meet required standards.	Reduction in handle times of enquiries Better motivated and confident staff Improved customer service delivery Improvement in scoring of individual's quality managed calls	On-going	Customer Services Supervisor/Support Officer	Templates developed software changes being made	GREEN
CUSTOMER ENGAGEMENT	Use the website to communicate meaningful information to our citizens	Customer satisfaction improvements - customer expectations are managed better when targets are understood	On-going	Revenues & Customer Service Manager/Corporate Communications	On Going My Inverclyde is now live on the website	GREEN
SERVICE DEVELOPMENT	Develop Kana system , implementation of web self service portal, mobile applications for citizens and staff, mapping integration for location based fault reporting with corporate GIS system.	Reduced workload for customer services. Streamlined process. Migration of Web-Labs eforms to Kana eforms. Quicker service notification of new/updates to cases. Aligns to digital strategy allowing leverage of potential benefits.	Current - Dec '18	Revenues & Customer Services Manager & ICT	Project team is in place and engaging with suppliers to implement	GREEN
	Develop online mapping and on-line payments.	Increased achievement of efficiencies through a reduction in direct customer traffic to the Council and more resolution through lower cost channels. Wider range of funds available for on-line payments.		Digital Access group	Part of the Kana development	GREEN
	Report to Committee via MBWG by December 2015.	CSC staff well informed to provide the necessary advice to customers	From 2016	Revenues & Customer Services Manager/Principal Officer	Complete	BLUE
	Implement late opening. Regular staff meetings to take place.	Staff feel consulted and able to contribute to improvements through team meetings and feedback opportunities.	October/November 2015	Revenues & Customer Service Manager/CS Supervisor	Complete	BLUE
	Complete recruitment and creation of new teams.	New team in place. Improved customer performance.	June '15 - August '15	CS Supervisor	Complete	BLUE

	Review SLA's on an annual basis & conduct quarterly meetings.	Documents signed off by each service and higher levels of internal customer satisfaction.	On Going	Revenues & Customer Service Manager/CS Supervisor	Complete	BLUE
	Agree targets reflecting service vision and based on performance information. Agree areas to be reported and frequency. Analyse data/stats/feedback/customer surveys to identify and prioritise improvements.	Staff have clarity/clear objectives. Targets are achieved Performance reports, KPI's Performance meetings/benchmarking Changes implemented and improvements made	From Jan '16	Revenues & Customer Service Manager & CS Supervisor	Complete. Targets agreed in CDIP. Stats circulated monthly	BLUE
	Develop configuration of Lagan system to ensure the relevant information is captured for the Corporate complaints process and statistical returns	Accurate and regular MI is provided. Employees can confidently use the CRM system to log complaints and can obtain updates on progress. Complaints dealt with in a corporate manner and customer kept better informed.	August/September 2016	CFO, Revenues & Customer Services Manager & ICT Operations Manager	Monthly meetings held with Corporate Complaints Officer. All CS staff fully trained.	BLUE
	Annual Report to be produced and passed to senior management	Improved focus on key tasks and improved performance.	Sept '17	Revenues & Customer Service Manager	On target for September P&R	BLUE
	Develop consultation approach and select areas to be consulted upon.	Survey completed and action plan developed incorporating the needs of our customers	Sept '17	CS Support Officer	Slippage due to issues. New target date set of October 2017.	BLUE

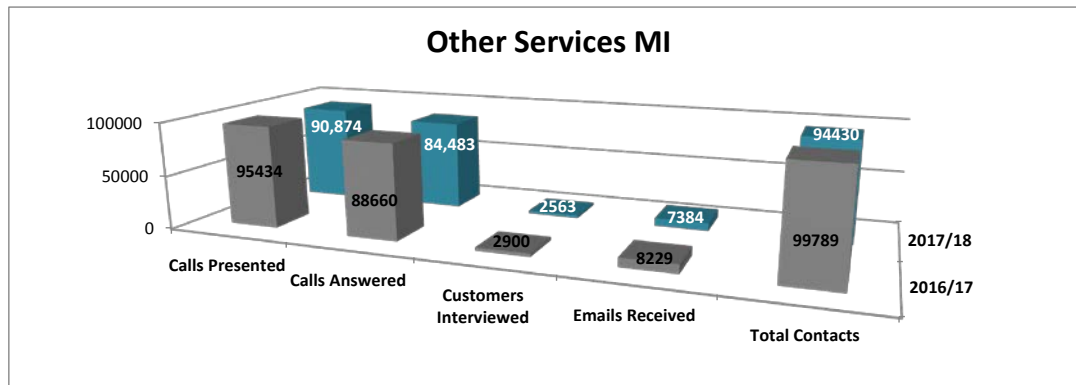
	2016/17	2017/18
Calls Presented	39385	34256
Calls Answered	30451	25,859
Customers Interviewed	13014	11494
Emails Received	5883	4381
Total Contacts	49348	41734



What does the MI show (annual)?

- * Calls presented has decreased by 13%. This is largely contributed to by a 36% decrease in Housing Benefit calls due to the roll out of Universal Credit (UC) full service in November '17.
- * Calls handed has remained at over 70% with this year achieving 72% handled calls.
- * Customers interviewed has decreased by 12% - again this is largely contributed to by the roll out of UC.
- * Abandoned call level has shifted slightly to 25%
- * Emails received has decreased by 26% - this is expected with the full UC roll out .
- * Total contacts has decreased by 18%
- * The team carried 2 FTE vacancies for 8 months of this financial year

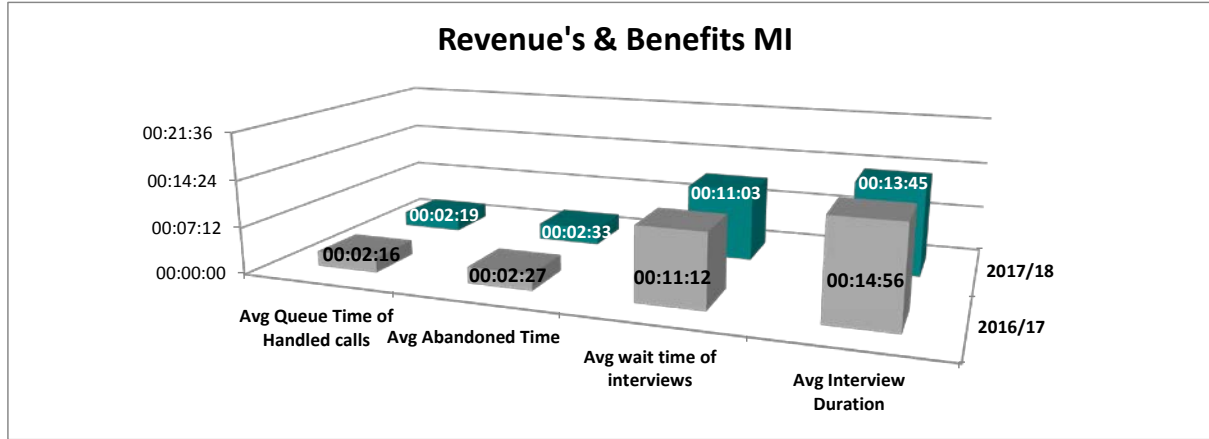
	2016/17	2017/18
Calls Presented	95434	90,874
Calls Answered	88660	84,483
Customers Interviewed	2900	2563
Emails Received	8229	7384
Total Contacts	99789	94430



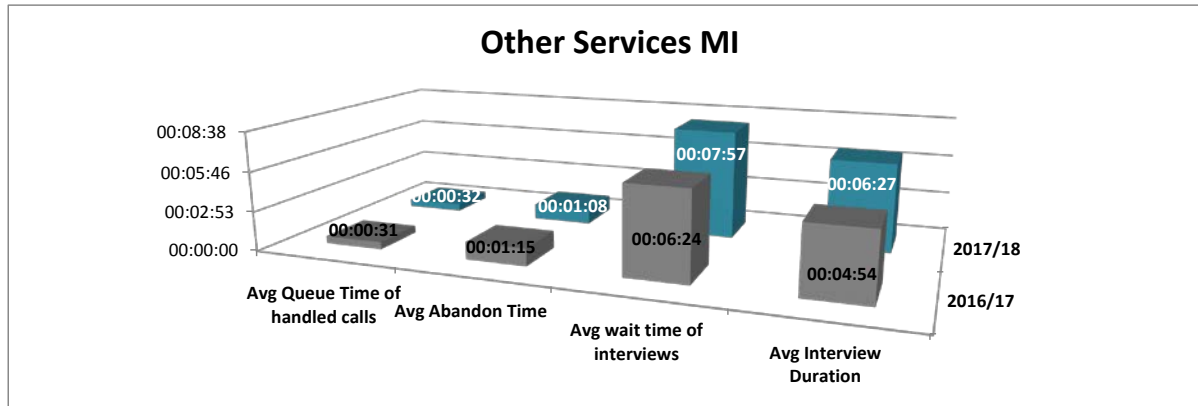
What does the MI show?

- * Calls presented for all other non R&B services has decreased by 5%
- * Calls handled for all other non R&B services has remained at a high of 93%
- * 7% of calls remain unanswered similar to last year - this is within our acceptable range
- * Interviews has decreased by 13%
- * Emails have decreased by 11%
- * Total contacts has decreased by 15%.
- * Through the mobile app and the website a total of 2197 enquiries were submitted. These were originally made via the CSC.

	Avg Queue Time of Handled calls	Avg Abandoned Time	Avg wait time of interviews	Avg Interview Duration
2016/17	00:02:16	00:02:27	00:11:12	00:14:56
2017/18	00:02:19	00:02:33	00:11:03	00:13:45



	Avg Queue Time of handled calls	Avg Abandon Time	Avg wait time of interviews	Avg Interview Duration
2016/17	00:00:31	00:01:15	00:06:24	00:04:54
2017/18	00:00:32	00:01:08	00:07:57	00:06:27



This toolkit aims to assist the process of carrying out analysis of the effects on equality of the policies, plans, strategies and programmes of Inverclyde Council. It sets out what services require to do in order to embed equality analysis into processes, and to ensure the Council meets its legislative requirements in regard to the Equality Act 2010.

This toolkit should be completed using the Equality Analysis Toolkit Guidance which provides further detail and information to assist in the process.

Policy Profile

<p>1 Name of the policy, plan, strategy or programme</p>	<p>Customer Service Strategy</p>
<p>2 Responsible organisations/Lead Service</p>	<p>Finance</p>
<p>3 Lead Officer</p>	<p>Fiona Maciver</p>
<p>4 Partners/other services involved in the development of this policy</p>	<p>ICT/Corporate Communications/Corporate Policy Team/Property and Facilities Management</p>
<p>5 Is this policy:</p>	<p>New Reviewed/Revised <input checked="" type="checkbox"/></p>
<p>6 What is the purpose of the policy? (include any new legislation which prompted the policy or changes to the policy)</p>	<p>To ensure that by having a strategy that the customers in Inverclyde receive a modern, effective service that is accessible to all</p>
<p>7 What are the intended outcomes of the policy?</p>	<p>The intended outcomes in the strategy are detailed in the document and are supported by a Customer Charter which clearly sets out the Council's values and commitment and likewise the behaviours we expect in return from our customers. This charter is publically displayed in the CSC.</p>
<p>8 What is the period covered by the policy?</p>	<p>2018-2021</p>
<p>9 Target geographical area</p>	<p>Inverclyde</p>
<p>10 Which parts of the Equality Duty is the policy relevant to?</p>	<p><input checked="" type="checkbox"/> Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act 2010 <input checked="" type="checkbox"/> Advance equality of opportunity</p>

	between people from different groups X Foster good relations between people from different groups
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Which of the protected characteristics will the policy have an impact upon? (see guidance for examples of key considerations under each characteristic)

Protected Characteristic	Positive Impact +	Neutral Impact =	Negative Impact -	Cross cutting theme
Age	The Strategy should have an impact on all protected characteristics as the strategy aims to deliver in line with the Councils vision of getting it right for every child, citizen and community. Through the achievement of the actions set out throughout the document and the Customer Charter, the Council should be in a position to ensure that the needs of protected groups and individuals are met.			The wellbeing wheel which for the purposes of the customer Service Strategy has been modified to illustrate where the service can have a positive influence on its customers. By engaging with our customers and working directorates such as CHCP and Education cross cutting activities should have a positive impact on our customers and should be inclusive all protected groups.
Disability	As above			As above
Gender Reassignment	As above			As above
Pregnancy and maternity				

Race	As above			As above
Religion or Belief	As above			As above
Sex	As above			As above
Sexual Orientation	As above			As above
Other groups to consider	As above			As above

**What evidence do you have to help identify any potential impacts of the policy?
(Evidence could include: consultations, surveys, focus groups, interviews, projects, user feedback, complaints, officer knowledge and experience, equalities monitoring data, publications, research, reports, local, national groups.)**

Evidence	Details
Consultation/Engagement (including any carried out while developing the policy)	<p>A citizens panel was conducted in the Spring of 2018. This survey is conducted on a biennial basis.</p> <p>There was also a targeted survey of CSC users in the Autumn of 2017.</p>
Research	Consultation with other Councils which helped develop the strategy and customer charter.
Officer's knowledge and experience (inc feedback from frontline staff).	<p>Responsive to comments made by frontline staff and from minutes of team minutes and analysis of the complaints and compliments received.</p> <p>Participation in the corporate equalities and financial inclusion.</p> <p>Working with services such as homelessness and education.</p>
Equalities monitoring data.	This is picked up through attendance at the Corporate Equalities Group.
User feedback(inc complaints)	<p>Complaints are recorded and monitored for trends and are examined to ensure that the complaint has not arisen as the result of an equalities issue.</p> <p>Observations from customers visiting the CSC are recorded on 'Footprint'</p>

Stakeholders	none
Other	
What information gaps are there?	No information gaps have been identified however work is underway for the Council to develop an British Sign Language Plan which should assist with bridging any current gap in service provision that could be currently be a barrier for those with this protected characteristic.

What are the actual or likely effects of the policy, in relation to the three aims of the equality duty and the protected groups? (list both positive and negative)

By continuing to review the CSC Strategy and associated Customer Charter, opportunities for protected groups should be enhanced through recognition.

What steps will you take in response to the findings of your analysis?

Analysis has shown that the Customer Service Strategy and associated documents are robust and take all levels of the Equalities Act 2010 into consideration; however it is acknowledged that there may be gaps in a few areas which could have a negative impact on protected groups, however other than improving on facilities for service users with a hearing impairment. It should be noted that since this EIA was last refreshed in 2012, a Loop hearing system has been installed in the CSC.

How will you review the actual effect of the policy after it is implemented? (e.g. monitoring)

Through the CSC action plan

What is the timescale for implementation?

2018-2021

How will you put the policy into practice and who will be responsible for delivering it? (e.g. other Council departments, partner agencies, communities of interest, equality target groups.)

CSC, Corporate communications, ICT and Services who have a business relationship with the CSC

What resources are available for the implementation of this policy? Have these resources changed?

Staffing resource within the CSC and relevant associated Services together with ICT support.

Name of Person (s) who completed the Assessment

Name: Fiona Maciver

Position: Revenues and Customer Services Manager

Date: 02 August 2018

Authorised by:

Name:

Position:

Date: