

Scrutiny Task and Finish Panel Agenda



Customer Transformation Task and Finish Panel Tuesday, 1st July, 2008

Place: Committee Room 2, Civic Offices, High Street, Epping

Time: 7.00 pm

Democratic Services Officer: Adrian Hendry, Office of the Chief Executive
email: ahendry@eppingforestdc.gov.uk Tel. 01992 564246

Members:

Councillors B Rolfe (Chairman), J M Whitehouse (Vice-Chairman), D Bateman, A Boyce, R Brookes, J Demetriou, Ms J Hedges, Mrs J Lea, R Morgan and J Philip

1. APOLOGIES FOR ABSENCE

2. SUBSTITUTE MEMBERS (COUNCIL MINUTE 39 - 23.7.02)

(Assistant to the Chief Executive) To report the appointment of any substitute members for the meeting.

3. DECLARATIONS OF INTEREST

(Head of Research and Democratic Services). To declare interests in any items on the agenda.

In considering whether to declare a personal or a prejudicial interest under the Code of Conduct, Overview & Scrutiny members are asked pay particular attention to paragraph 11 of the Code in addition to the more familiar requirements.

This requires the declaration of a personal and prejudicial interest in any matter before an OS Committee which relates to a decision of or action by another Committee or Sub Committee of the Council, a Joint Committee or Joint Sub Committee in which the Council is involved and of which the Councillor is also a member.

Paragraph 11 does not refer to Cabinet decisions or attendance at an OS meeting purely for the purpose of answering questions or providing information on such a matter.

4. TERMS OF REFERENCE (Pages 3 - 12)

Recommendation:

- 1. That the Terms of Reference for this Task and Finish Panel be agreed and submitted to the 10th July 2008 meeting of the Overview and Scrutiny Committee; and**
- 2. That the Panel agrees a preferred starting time for the Panel meetings.**

(Chairman/Lead Officer) The Overview and Scrutiny Committee at its meeting of 10 April has agreed to the establishment up of this Panel. The Panel is now requested to review its draft terms of reference and to submit it to the Overview and Scrutiny Committee on 10th July 2008.

In order to help the Panel, a set of 'Notes for guidance' for the operating of a Task and Finish Panel is also attached. This sets out how a Task and Finish Panel should ideally go about scoping its programme of work, gathering information and evidence. The note also suggests how final reporting back to the main Overview and Scrutiny Committee and the larger Council is undertaken. A draft layout for a Final Report is also attached as a useful practical example of what the Panel are required to produce.

In order to assist Members, a Draft set of Terms of Reference has been prepared for the Panel's consideration and agreement.

5. SCOPING REPORT (Pages 13 - 16)

An initial scoping report for this Panel to consider is to follow. The key issues within the report will be presented to Members at the meeting.

6. ANY OTHER BUSINESS

7. DATE OF NEXT MEETING

To agree a date for the next meeting of this Panel.

Introduction:

In order to improve access to services and improve response to enquiries, the Council has previously embarked on exploring the feasibility of a "Customer Transformation Programme". The initiative was held in abeyance until such times as the affordability of the project could be assessed, given pressure on the Council's revenue Budget and uncertainty around the cost of the new Waste Management Contract. Now that the Council's Medium Term Financial Forecast is clearer, there is value in revisiting the Customer Services Agenda, to see where improvements can be practically achieved.

Term of Reference:

1. To undertake a review of the Customer Services Programme previously explored by the Council, and to identify and prioritise these initiatives which could have the greatest impact on improving access to services and response to enquiries.
2. To review existing quality standards with respect to Customer Services and recommend change as necessary to ensure that they meet the current expectations of the Council's customers.
3. To ensure that the Council is complying with its duty under Equalities Legislation to provide access to all sections of the Community to Council Services.
4. To assess the most appropriate and cost effective method of enabling the Council to meet the requirements of the New Statutory National Indicator N14, with respect to "avoidable contact".
5. To identify areas for improvement in how the Council communicates its "key messages" to our community, ensuring that public information is clearly understood and accessible.

Aims and Objectives/Methodology:

To gather evidence and information in relation to the topics through the receipt of data, presentations and by participation in fact finding visits;

To consult with Partners, Agencies, Stakeholders and Users of the services under review, to establish key issues and future need;

To evaluate all relevant facts in relation to the topics under review in an objective way and to produce recommendations for future action accordingly;

To establish whether there are any resource implications arising out of the topics under review and advise Cabinet for inclusion in the Budget Process 2009/10; and

To report back to Overview and Scrutiny Committee at appropriate intervals and to submit any final reports in the proposed Corporate Format for consideration by O & S, the Cabinet and Council.

CUSTOMER TRANSFORMATION TASK AND FINISH PANEL: TERMS OF REFERENCE

TIMESCALE	ESTIMATED	ACTUAL
Commencement	June 2008	
<u>Finish</u> 1. Interim report to include any budgetary items for the next budget round.	By October 2008	
Reports.		

TASK AND FINISH PANELS GUIDANCE NOTES

Introduction

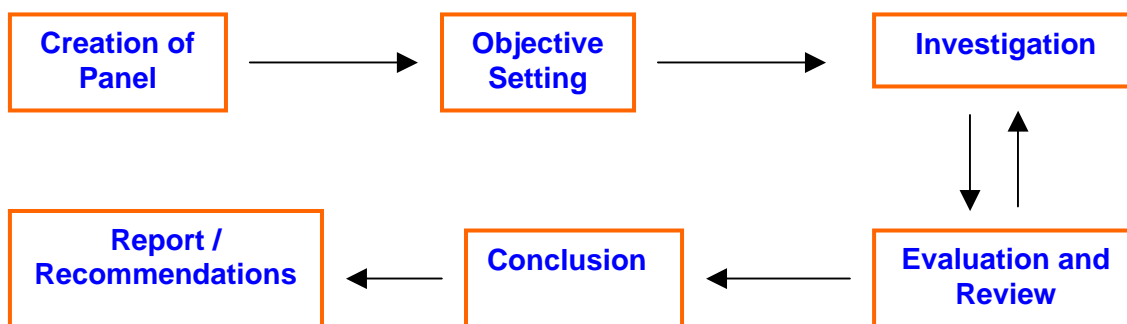
1. Task and Finish Scrutiny Panels are established by the Overview and Scrutiny Committee in order to deal with ad hoc projects or reviews included in the annual work programme for Overview and Scrutiny.
2. Task and Finish Scrutiny Panel status will be restricted to those activities which are issue-based, time limited and non-cyclical in character and have clearly defined objectives.
3. Task and Finish Panels as with all Overview and Scrutiny must be member led. The members should control the agenda and have ownership of the work programme.

Scoping Phase

4. **(Pre Scoping)** Before their first meeting with the Chairman, the Lead Officer should hold an informal meeting with any officers that may be connected to the topic to be reviewed to try and establish any and all issues related to the subject, so that that the Lead Officer on meeting with the Chairman, has some background information to submit.
5. **(Scoping)** At the start of a Task and Finish Panel the Lead Officer will draft the Terms of Reference in conjunction with the Chairman of the Panel. The Panel will then meet to discuss the Terms of References and decide how they are to achieve their goals. An emphasis must be put on clear and realistic objectives, which are timely and time limited.
6. Terms of Reference and objectives should, if at all possible, be defined using the **SMART** objective framework:

Specific Measurable Achievable Realistic Time Limited

7. The life cycle of a Task and Finish Panel will look like this:



Investigation Phase

8. Before any conclusions can be drawn, evidence must first be gathered. All available sources must be tapped, making the most of the expertise within the Council, any outside organisations and public opinion if applicable.
9. The investigation phase can be handled as a full group review or as a 'delegated tasks' approach, with individual members or small sub groups, gathering evidence to bring back to the full Panel.
10. Any reports by officers to a Task and Finish panel should provide relevant evidence and background but should not make any recommendations. They should be done in an informal style, and not mirror the house Cabinet, Portfolio Holder style of reports.
11. If thought necessary outside bodies should be involved in the evidence gathering phase, either by inviting that organisation to give a one off presentation or by co-opting an outside member onto the Panel for the duration of the Panel's life in a non-voting capacity.
12. Creativity and imagination should be used in gathering evidence. Ways can and should be found of getting the views of groups who may be overlooked. Perhaps the review should be publicised and contributions invited, the use of community venues encouraged and feedback provided to participants.

Witnesses and Questioning

13. When questioning witnesses, questions should be kept brief, clear and to the point. Start with broad questions first and then narrow down the focus. Remember to use 'follow ups' to obtain a clearer explanation. The use of pre-meetings could be used to organise the Panels approach to the questioning of 'witnesses' and to get the most out of the session.
14. Remember the panel is not there to trip people up, "grill" them, apportion blame or to make their life difficult. Rather it is to understand the issues affecting the topic under review and how it affects the District Council and its residents.

Gathering Evidence

15. Methods of evidence gathering should be as systematic and objective as possible, not just anecdotal. Use a variety of approaches and not just rely on a single source. Some different ways that evidence could be gathered are:

- Statistical Surveys;
- Focus Groups and Workshops;
- Public Meetings;
- Self-advocacy groups;
- Street surveys;
- Site visits;
- Mystery Shopping.

Panel members should carry out these tasks, design the survey forms or prepare the questionnaires themselves. Officers are to be used in an advisory capacity only.

Report and Follow-up

16. The concluding report will need to be clear, concise, evidence based with illustrative anecdotes. All the evidence gathered should be listed and if thought appropriate summarised. There will need to be clear, realistic and specific recommendations formulated so that progress can be measured and followed up. The report should (wherever practicable) ask for responses to its recommendations within a realistic time period. (A draft format of a Task and Finish report is attached.)

17. The report should, if thought appropriate, be promoted to the public, e.g. through a press release and/or publicised via our website.

18. A mini-review of outcomes be carried out after an appropriate period (not later than six months (if appropriate) after the end of the panel). The results of this review should be reported back to the main Overview and Scrutiny Committee. The entire Panel should not be involved in this follow-up review. The Chairman on his/her own or a small sub-group of two or three members would be enough. They could provide the full panel with a short written report on their findings if necessary; otherwise a verbal report would suffice.

Democratic Services
July 2006

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Epping Forest District Council



SCRUTINY

REPORT OF THE XXX TASK AND FINISH PANEL

JULY 2007

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- Make the contents table lines invisible
- Each section to start on its own page
- The addition of photographs always make a report more reader friendly and a document more professional looking.
- It may be argued that the introduction and context section could be put under one heading. Splitting up these headings helps to keep the report in small chunks, making it easily readable and more accessible.
- The same applies for keeping the recommendations separate from the main body of the report.
- If needed more section headings can be added.

1. Chairman's Foreward

Setting out briefly what the panel was tasked to look at, and how the panel went about it.

The Chairman can use this section to give any personal thanks to the people and organisations consulted.

This should take up about one side of A4.

2. Introduction or Overview

This section sets out the formal terms of reference for the panel, who they consulted and how they went about gathering the evidence (i.e. by interview, site visits, questions to organisations, questionnaires etc.). This will be a more detailed explanation that's in the Chairman's forward.

If pertinent it should set out why the Panel did not look at some aspect of the topic they were charged to look at.

3. Context

Background to the topic under review – how Government Policy fits in, any relevant legal considerations any laws (European or domestic).

How the Council's policies are affected (if at all) or how EFDCs geographical area fits in (local context) and any other local considerations that were taken into account.

4. Summary of Recommendations

The Panels recommendations should be listed out here. If there are enough recommendations it could be divided into sections, each relating to different section of the report.

Recommendations should begin: **"The Panel recommends that...."**

5. Report

This section will detail the evidence gathered and the conclusions reached. This should be related to the recommendations made in the summary of recommendations.

Start with a general introduction (if thought useful) and then repeat each recommendation adding an explanation as to why that recommendation was made, citing any evidence gathered and the conclusions drawn. In order to meet legal requirements, if the recommendations are to go on to Cabinet or Council for action, the report should indicate any options that were considered and rejected and reasons why.

6. Conclusion

Very short version of report for busy people – maybe with an eye for putting this bit out as a press release.

7. Acknowledgements

To give formal acknowledgement to any sources used e.g:

Organisations;

People;

Officers;

Experts;

Websites;

Laws;

Locations visited;

Council policies etc.

8. Appendices

If needed to add background information, tables, graphs etc.

CUSTOMER TRANSFORMATION TASK AND FINISH PANEL

Item 5 – Scoping Report

Customer Services Transformation Programme

The improvement of Customer Services has been a long held aspiration with references dating back to the Council's Implementing Electronic Government Statements from 2002 onwards. Indeed, as part of the Council's last Comprehensive Performance Assessment the Audit Commission were critical of the authority's lack of progress in this area.

In response to Members' concerns and in line with many other local authorities across the region, in 2005 the Council commissioned external expertise, Steria Ltd, to review customer service performance and identify areas for improvement.

Whilst identifying that there were some examples of good customer service, this had not permeated throughout the authority in a consistent way. In particular, the consultants concluded that:

- 1. Opening hours are not designed around customer needs, in particular with respect to telephone enquiries.**
- 2. The Authority appeared to suffer from a lack of internal communication and adherence to standards.**
- 3. Five reception desks in the Civic Offices is too many and confusing.**
- 4. Telephone answering performance is poor, with a propensity to pass the customer on.**

In September 2005, the Council endorsed the findings of the consultants and agreed to commission a further external agency (Foresight Consulting Ltd) to develop a plan for the implementation of a Customer Services Transformation Programme (CTP) to address the issues identified above.

The objectives subsequently identified and agreed by Cabinet for the CTP were as follows:

- To transform the organisation to a position where the customer is seen at the heart of the Council's operations;
- To improve the customer experience and ensure the quality of service is consistent whenever, wherever and however customers contact the Council;
- To achieve an improvement in customer satisfaction and customer service within the first twelve months of the programme;
- To establish a front/back office organisational model and set up a Corporate Customer Services front office where a high number of enquiries are resolved first time at the first point of contact;

- To re-organise the Civic Offices to enable customers to access the majority of Council services at a single reception/customer services area on the ground floor and to improve access to Council committees and other public meetings.
- To improve back office efficiency and productivity by answering a high number of enquiries in the new customer services front office;
- To deploy and develop Customer Relationship Management software in association with the website and a new intranet to provide accurate and timely information for Members and officers on service issues, customer trends, access channels and service usage and costs.

The Programme Plan itself was developed and approved by the Council in July 2006. In addition, the Cabinet also requested provision be made in the Capital Programme of some £2.2 million and that a CSB Supplementary estimate of £150,000 and DDF Supplementary for £362,000 be recommended to the Council to resource the changes proposed.

In the event the Capital Bid was agreed and provision still exists within the Council's current Capital Programme, but due to uncertainty around the costs of Waste Management, no provision was made in the 2007/08 Budget or in subsequent years for additional revenue. As such the programme has been held in abeyance.

Point 1 – Members of the Task and Finish Panel are asked to consider whether they feel the Objectives of the CTP are still relevant, and whether they would like to focus on any particular aspect previously identified.

Neighbourhoods/First Stop Shops

The Council agreed the Best Value Performance Plan on the 20 June 2008. Contained within the Plan are the Cabinet Objectives 2008-09. Corporate Priority No. 2 "is to explore options to improve the accessibility of the Council's services, through customer focused initiatives including neighbourhood services and one stop-shops".

Point 2 - The Task and Finish Panel are asked to accept the responsibility for undertaking this exploratory work to ensure that services are accessible, which may involve visiting/reviewing other neighbouring authorities' approach.

Customer Communication

The Council utilises a number of different mediums to communicate information and consult with residents and visitors to the District. These range from the Website, to publications, press releases and The Forester magazine. It is important to ensure that information is provided in a form that is accessible and easily understood by the public. This is true also of committee reports which are now accessible through the Council's Website. The Council has previously engaged a "Plain English" consultant and a number of publications received the "Crystal Mark" accreditation. The Task and Finish Panel will be receiving a presentation on the Council's Website, to give an insight into its current format and its future potential.

Point 3 – Does the Panel feel that Council's current written communication could be improved by the adoption of "Plain English" standards and if so, they wish to explore the practicality of adopting such an approach.

National Indicator

The previous statutory Best Value Performance Indicators have now been replaced by a new National Indicator Set. As part of this new set is an indicator, which is, designed to gauge District Councils Performance with respect to answering enquiries from the public. NI 14 looks at avoidable contact, in effect, seeking to test whether enquiries are answered at the first point of contact and avoiding subsequent need to seek further information. Many authorities are in a much better position to collect the data on this indicator given that they have Customer Relationship Management Systems. Such systems record, manage and route telephone calls and enquiries. The Council currently lacks such a system and will be required to resort to a manual survey, to meet our statutory requirement to provide performance data. This is unlikely to be sustainable in the long-term.

Point 4 – The Task and Finish Panel are asked to consider including the feasibility of acquiring a CRM system for the Council, not only to comply fully with NI 14 but also to improve customer services.

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