

Customer Experience Task Group

**Date & time**

Tuesday, 4
February 2020 at
2.00 pm

Contact

Clive Mentzel, Scrutiny Officer
Room 122, County Hall
clive.mentzel@surreycc.gov.uk

Elected Members

Mr Will Forster, Mr Bob Gardner, Mr Nick Harrison, Mr Chris Townsend and Mr Richard Walsh

AGENDA**1 SCOPING AND BACKGROUND DOCUMENTS**

(Pages 3
- 106)

Please see annexed documents.

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Select Committee Task and Finish Group Scoping Document - Customer Experience Transformation

The process for establishing a task and finish group is:

- 1. The Select Committee identifies a potential topic for a task and finish group.**
This topic was agreed as part of a discussion on the Transformation Programme Update discussion held by the Select Committee on 18 October 2019.
- 2. The Select Committee Chairman and the Scrutiny Officer complete the scoping template.**
Completed before the Resources and Performance Select Committee meeting on 16 December 2019.
- 3. The relevant Council Overview and Scrutiny Committee reviews and agrees the scoping document.**
Reviewed and agreed by the Resources and Performance Select Committee on 16 December 2019.
- 4. The Select Committee agrees membership of the task and finish group.**
Membership of the task and finish group discussed on 16 December 2019. Members: Chris Townsend, Nick Harrison, Will Forster, Bob Gardner and Richard Walsh.
- 5. The task and finish group meet to agree work allocation, final report and other deadlines and any other practical aspects relating to relevant actions – see Action Plan below, page 4 for detail.**
First meeting held on 04 February 2020 to agree scope and work allocation as outlined below.

Review Topic: Customer Experience Transformation

Select Committee: [Resources & Performance](#)

Relevant background:

The council is undergoing a major programme of transformation and the Resources and Performance Select Committee has previously scrutinised specific programmes that sit within its remit. One of these programmes is Customer Experience, which has already delivered a range of capabilities and benefits.

The wider transformation programme is being refreshed and refocused to ensure that it is adaptable and continues to meet the council's evolving objectives and priorities. Customer experience is a critical element of this work given the links and dependencies it has with other programmes and it is therefore an appropriate time for Members to contribute their knowledge and perspectives in order to help shape the future direction of the programme and ensure that it supports the next phase of transformation.

Members agreed that the most effective means of doing this would be via a deep dive of the Customer Experience programme, using a creative and practical approach to scrutiny extending beyond formal committee meetings. A Task and Finish Group has been formed in order to achieve this.

Why this is a scrutiny item?

It is envisaged that Members will play a key role in the successful delivery of the Customer Experience programme by becoming champions for this work. There are a range of opportunities to explore around the concept of customer and Members will be able to provide valuable insights as to what residents want us to deliver.

What questions are the task and finish group aiming to answer?

- What do residents expect and value when they interact with the council as customers?
- How can both Members and Officers understand and develop the concept of Customer to improve insights into customer wants and needs?
- How can Members lead this work?
- How can we effectively link an improved customer journey with benefits to communities 'on the ground'?
- How can this work improve community capacity, capability and participation?
- What best practice or learning can we gather from other local authorities?

Aim:

The Task and Finish Group completes a deep dive review of the Customer Experience programme in order to support and champion its successful delivery going forwards.

Objectives:

1. To understand and quantify the work on Customer that has been completed as part of the transformation programme to date and the impact it has had on residents, staff and the wider organisation.
2. To help shape and define the future direction and priorities of the Customer Experience programme.
3. To ensure that work both being designed and delivered supports an overarching ambition that we are providing what matters to residents and creating an enhanced customer experience.
4. To consider the role of Members and approach to scrutiny in this and other transformation programmes.
5. To understand the Resident Survey Methodology, results and targets.

Scope and approach to the work:

The Task Group's remit will be related to work streams within the Customer Experience programme. As the programme moves into a new phase as part of the transformation refresh it is the intention that Members provide support and insight to ensure that it delivers what residents want and need.

Regular operational activity and the day to day running of the service will not be in the scope of the review.

It is envisaged that Members will be supported to use a wide range of tools and approaches to deliver this work, including:

- Site visits.
- Evidence gathering from other authorities.
- Feeding-in their knowledge of residents' views, perceptions and expectations.
- Hands-on testing of new portals, systems and processes.
- Interaction with service staff to better understand the service, its outputs and current pressures (e.g. use of Children's' Single Point of Access).
- Incorporation of the Resident Survey (methodology, results, targets) as appropriate.

Outcomes for SCC / Benefits

- Clearer understanding and definition of the concept of Customer.
- Improved insights into customer demands and expectations.
- Supporting achievement of the Community Vision's strategic principles, including enabling people to 'help themselves and each other' and 'get the information they need at the right time and place'.
- Improved perceptions and feedback of customer interactions as a result of new approaches and systems.
- Effective demand management by redirecting residents to self-help resources.
- More cost-effective and efficient means of communication and service delivery.
- Positive changes to residents' behaviour – i.e. greater use of the council website, online and automated systems and reduced reliance on direct contact.
- Supporting delivery of the wider transformation programme's ambitions, including those related to agile, digital and moving closer to residents.
- Potential to achieve financial savings as a result of the above.

Proposed work plan:

It is important to outline work-strands and clearly allocate who is responsible for the work, to ensure that Members and officers can plan the resources needed to support the task group.

Timescale	Tasks	Responsible
February	<ul style="list-style-type: none"> • Review the work done to date through various work-streams to transform customer experience and understand the impact of this work. • Finalise programme for the Councillor visit on 6 March. • Develop key lines of enquiry. • Survey of elected members to feed in their knowledge of resident's views, perceptions and expectations. • Background information pack sent to Task & Finish Group to set context and provide essential information about the service / transformation programme aims – See links in this document under heading “Useful Documents.” • Presentation on the <i>Resident Survey</i> followed by discussion. Presentation should cover how other Councils do resident surveys. See Annex 1. 	<p>Councillors / Programme Managers / Clive Mentzel.</p> <p>Clive/Sarah.</p> <p>Task & Finish Group.</p> <p>Heather Chapman, Clive Mentzel. Task & Finish Group.</p> <p>Susan Grizzelle / Sarah Bogunovic / Louise Halloway / Carpinello Petruzzello / Clive Mentzel.</p> <p>Nicola Kilvington/Rich Stockley.</p>

Timescale	Tasks	Responsible
<p>March</p> <p>6 March 2020, 10:00 to 16:00</p>	<p>Customer Services Site Visit</p> <ul style="list-style-type: none"> • Site-specific preparatory/background information sent to Councillor Task and Finish Group in advance – see links below in this document under heading “Useful Documents.” • Initial introduction: Setting the overall scene for the Task & Finish Group. This introductory session also to include fleshing out and presenting more detail on the document included in the papers for Full Council relating to the transformation programme and the customer services section within it. In addition, Cllrs would like a summary of how the 11 Boroughs in the County approach Customer Service. • Subsequent to introduction, office tour and meetings with a specific focus on Request for Support Team, Adult Social Care (MASH and Portal work), Highways and Web. • Testing / Demos of new online Highways Journeys and Adult Social Care Portal - showing the 'before' and 'after' experience. • Webchat testing. • Interviews with key service contacts to understand value and impact of Single Front Door model. • Survey - Customer experience and expectations when contacting the council. • User Testing Session - members to attend session with residents. 	<p>Susan Grizzelle / Sarah Bogunovic / Tom Pooley / Clive Mentzel.</p> <p>Susan Grizzelle / Sarah Bogunovic / Louise Halloway.</p> <p>Claire Thomas / Rachel Bearman / Rik Jackson.</p> <p>Rachel Bearman.</p> <p>Rachel Bearman.</p> <p>Carole Comfort.</p> <p>Heather Chapman.</p> <p>Rik Jackson / Heather Chapman.</p>

Timescale	Tasks	Responsible
<p>Date to be determined.</p> <p>Mid/Late March</p>	<ul style="list-style-type: none"> • Play-back session from Customer Service Centre visit and evidence gathering. <p><u>External Benchmarking:</u></p> <ul style="list-style-type: none"> • Learning from other Local Authorities - interviews, site visits and evidence gathering – Set up visits/meetings. <ul style="list-style-type: none"> • Analysis of Councillor Survey. 	<p>Task and Finish Group / Susan Grizzelle / Sarah Bogunovic / Marie Snelling / Tom Pooley / Clive Mentzel.</p> <p>Task & Finish Group / Susan Grizzelle / Sarah Bogunovic / Marie Snelling / Sarah Bogunovic / Clive Mentzel.</p> <p>Clive Mentzel/Heather Chapman.</p>
<p>April</p> <p>14 April</p>	<p><u>External Benchmarking:</u></p> <ul style="list-style-type: none"> • Learning from other Local Authorities - interviews, site visits and evidence gathering. • Play-back session from visits and evidence gathering. • Collate and review findings from research and experience. • Prepare task group progress update report for Select Committee meeting on 23 April; deadline for this is 14 April. 	<p>Task & Finish Group supported by Susan Grizzelle / Sarah Bogunovic / Marie Snelling / Tom Pooley / Clive Mentzel.</p>

Timescale	Tasks	Responsible
May	<ul style="list-style-type: none"> • Finalise learning from other Local Authorities - interviews, site visits and evidence gathering. • Play-back session from visits and evidence gathering. • Collate and review findings from research and experience. 	Task & Finish Group / Scrutiny Officer.
June 11 June 22 June	<p>Draft and finalise task and finish group report.</p> <ul style="list-style-type: none"> • Agree Draft for Chairman’s draft report meeting. • Deadline to finalise report. 	
1 July 2020	<ul style="list-style-type: none"> • Discussion/agreement of report at Select Committee meeting and transmission of recommendations to Cabinet. 	Task & Finish Group.

Witnesses

[Cabinet Member for Corporate Support](#)

[Cabinet Member for Children, Young People and Families](#)

[Cabinet Member for Adults and Public Health](#)

Executive Director – Transformation, Partnerships and Prosperity

Director – Transformation

Transformation Programme Managers

Customer Services Group Manager

Customer Relations and Service Improvement Manager

Relevant Service Directors in Children’s, Adults and Highways

Neighbouring Local Authority Cabinet Members and Officers

Residents/customers

Useful Documents

Surrey County Council (Annexes refer to documents in e-mail to Cllrs, not documents attached to this Plan except for Annex 1):

- Customer Experience transformation programme business case (Annex A).
- Transformation Programme update to Resources & Performance Select Committee on 18 October 2019 (Annex B).
- Community Vision for Surrey 2030 (Annex C).
- Equalities Impact Assessment published 21 January 2019 (Annex D).
- [Minutes](#) of the Resources and Performance Select Committee meeting on 16 December 2019 (Annex 1).
- Customer Services Service Plan (Annex F).
- Customer Services Online Uptake Benchmarking (Annex G).
- Customer Services Performance January to June 2019 (Annex H).
- Transformation Programme – Guide to Individual Programmes (Pages 50/51 of Annex I).
- Surrey Residents Survey (Needs refreshing, is dated).
- Who are our customers? Surreyi.gov.uk.
- Surrey Joint Strategic Needs Assessment.

Other Authorities:

See **Table A** below.

Additional Resources:

Customer Service Excellence: <https://www.customerserviceexcellence.uk.com>

The Institute of Customer Excellence: <https://www.instituteofcustomerservice.com>

Potential barriers to success:

- Availability of relevant Members, Officers, benchmarking local authorities and other key stakeholders.
- Member awareness/visibility of the programme's role in the wider transformation programme (i.e. understanding of interdependencies etc.).
- Engagement with, and capacity for, site visits and testing of new processes.
- Resource within the service to facilitate/support Member evidence gathering.
- Willingness/availability of external partners to participate in this work.
- Customer Services heavily engaged with logistics of the office move during period of review.

Equalities implications:	
<p>The Task Group recognises that there are numerous considerations around equalities when conducting its work, and that there are many people with various needs that will be part of this process. It will be mindful of how it conducts its work in order to ensure people are provided the opportunity to contribute, and that any barriers to doing so are mitigated. It will also conduct its work mindful of the requirements of the Equalities Act 2010 and its prescriptions in relation to customers interacting with the Council.</p> <p>Although there are no major equalities implications identified at the outset of this work, the Group will monitor any equalities implications emerging from its recommendations with officers and will work to identify mitigation measures for those with a potentially negative impact. The group will take into consideration the Equality Impact Assessment on the Customer Experience carried out as part of the wider transformation programme.</p>	
Task Group Members:	Chris Townsend , Nick Harrison , Will Forster , Bob Gardner and Richard Walsh .
Co-opted Members:	None.
Spokesman for the Group:	Nick Harrison.
Scrutiny Officer:	Clive Mentzel / clive.mentzel@surreycc.gov.uk

Table A: Local Authority Benchmarking as agreed by Councillors on 04 February 2020:

Local Authority:	Contact/s:	Method:	Date:
Either West Sussex	Head of Customer Experience.	Skype	
Or East Sussex	Customer Services Manager	Skype	
Cornwall Council	Head of Customer Experience	Skype	
Local Surrey District and Borough Councils	Councillors felt one would suffice, either a District or a Borough.	Visit	
Hampshire	To be determined.	Skype	

Hertfordshire	To be determined.	Visit	
OneSource - the Orbis-equivalent for Havering, Newham and Bexley		TBD	

Notes:

1. **Meetings to be set up on dates where a minimum of 3 Cllrs can make it.**
2. **Either West or East Sussex to be chosen - officers to make determination.**

Annex 1:

Resident's Survey – Extract from the [minutes](#) of the Resources and Performance Select Committee meeting on 16 December 2019:

1. The Cabinet Member for Corporate Support highlighted the particular indicators RS 01 and RS 02 ('satisfaction with the way the council runs things' and 'satisfaction that the council offers good value for money' respectively), which had been given a target following the previous meeting. These targets were developed in comparison with other local authorities.
2. The Committee thanked the Cabinet Member for adding the targets and queried how the surveys collecting the data operated. It was concerning that while most targets were aspirational, RS 01 and RS 02 had low or static targets. The Executive Director of Transformation, Partnerships and Prosperity explained that data was gathered using both online and telephone surveys, the latter being collected by a market research company.
3. A Member asked where approximately the council stood on customer satisfaction and value for money in comparison to other local authorities. The Cabinet Member detailed some previous figures for satisfaction from other authorities, which ranged from about 58-60% (compared with Surrey County Council's latest result of 53%).
4. With regards to value for money, the Cabinet Member quoted figures of around 40-44% (compared with Surrey County Council's latest result of 35%). However, these figures were for borough councils, not county councils, so they were not directly comparable. Issues with RS 01 and RS 02 and how the data was collected could be investigated by the Customer Services Task Group.

Customer experience

“Making people’s experience of dealing with the council quicker, easier and better”



Strategic Priorities – Focus for 2020-25



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What is the programme ambition?

The programme aims to transform what people experience when dealing with the Council, be that through online services, contact with a staff member, or more indirectly through support the council helps facilitate in their local community. The next phase of this programme will be focused on areas where people contact the council for help and support, making sure it is seamless, easy and automated where appropriate for speed and simplicity. At the same time we will ensure the more vulnerable in our communities can always access what they need. A key priority is to introduce improved ways to access to and discuss Special Educational Needs and Disability (SEND) related support.

As we complete this next wave of improvements we will also start to look at our future ambitions, including further part of the council’s operations, joining up across different public sector organisations and using the power of new technologies and data.

What will be different for residents?

- It will be easier to contact the council, whatever the issue
- More support and information will be accessible online 24/07 or through webchat and chat-bots, providing a quicker resolution, especially for routine enquires and advice and information
- People with specific needs and support will receive the right help and support first time
- Frontline staff can dedicate more time to the people they support rather than be tied up in managing triage and request processes

Who is leading the programme?

Cabinet Lead(s)	Tim Oliver (Leader), Zully Grant-Duff (Cabinet Member for Corporate Support)
Senior Responsible Owner (SRO)	Marie Snelling, Director of Transformation
Accountable Executive [Director]	Sue Grizzelle, Head of Customer Services
Programme Manager	Rik Jackson

How will we know it is successful?

- Residents report improved satisfaction with the customer service they receive
- Automation is used widely and effectively to improve services
- We have fully established a single way (“a single front door”) for contact with the council
- Systems and processes for interactions with residents are joined-up across all parts of the council

Customer experience

“Making people’s experience of dealing with the council quicker, easier and better”

Progress to date

- Established the Children's Request for Support Team within Customer Services - the initial gateway for the C-SPA (Children's Single Point of Access) which ensures children and families get the right support quickly
- Non-urgent Adult Social Care emergency service referrals and professional referrals (via online portal) now routed through the Adults Team within Customer Services
- Successfully re-designed and launched new online customer journeys for reporting Highways defects
- Implemented 'webchat' on a growing number of council webpages with a 93% satisfaction level

Focus for the next phase

- Complete all outstanding work from the first phase of customer transformation, making sure that contact to the council is quick, easy and well managed through a “single front door” approach
- Continue to use automation where it can provide a better, quicker service to residents
- Establish the programme team to develop the next wave of opportunities, looking at use of new technologies and potential join up with other organisations
- Manage the move of the Customer Services team to Fairmount House and changes to operating practice (as part of the Moving Closer to Residents programme)

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High Level Milestone Plan

2019/20 Q4	2020/21 Q1	2020/21 Q2	2020/21 Q3	2020/21 Q4
<ul style="list-style-type: none"> • Increase use of webchat/chatbots • Highways enhance Reporting • ASC MASH discovery • SEND front door discovery • SFRS – preventative agenda 	<ul style="list-style-type: none"> • Complete SEND discovery, begin design • Undertake planning of team move to Fairmount • Undertake opportunities assessment across whole SCC and partners where possible, producing roadmap 	<ul style="list-style-type: none"> • Highways - further customer functions into Customer Services team • Finalise SEND front door/triage design 	<ul style="list-style-type: none"> • Customer activity analysis/generation of insights to drive improvements • Countryside • Coroners • Libraries • Delivery SEND front door/triage 	<ul style="list-style-type: none"> • Agree and start next phase of programme

Transformation investment and efficiencies (2020/21)

Total investment £0.5m

Total expected efficiencies £0.2m
+ potential future efficiencies

RESOURCES AND PERFORMANCE SELECT COMMITTEE

18 October 2019

Transformation Programme Update



Purpose of report: To provide the committee with an update on current progress regarding transformation of the council, to seek their input to the next phase of work, and identify approaches to ensure effective ongoing scrutiny.

Introduction:

1. Over the last year the council has embarked upon an organisation wide programme of change and improvement to address a number of performance, financial and cultural shortcomings in order that we can help deliver the very best outcomes for the people of Surrey.
2. On 13 November 2018, Full Council endorsed a strategic and financial direction for the council in response to the agreed Community Vision for Surrey in 2030. This included a major [programme of transformation](#) for 2018 - 2021, designed to secure the council's financial sustainability and fundamentally reform the function, form and focus of the organisation.
3. Through the work to date we have established the foundations for longer term change and improvement, including a stabilised budget position. We have also introduced new service models and approaches that are successfully delivering different ways of working with our residents and partners. For example, the Effective Family Resilience Model in Children's Services and the practice model for "front door" conversations in Adult Social Care are helping prevent problems earlier and better supporting residents and communities to be independent.
4. The purpose of this report is to present the following aspects of transformation for scrutiny:
 - Overall progress and direction of transformation across the council
 - Those (enabling) projects under the remit of the committee

Overall progress and direction

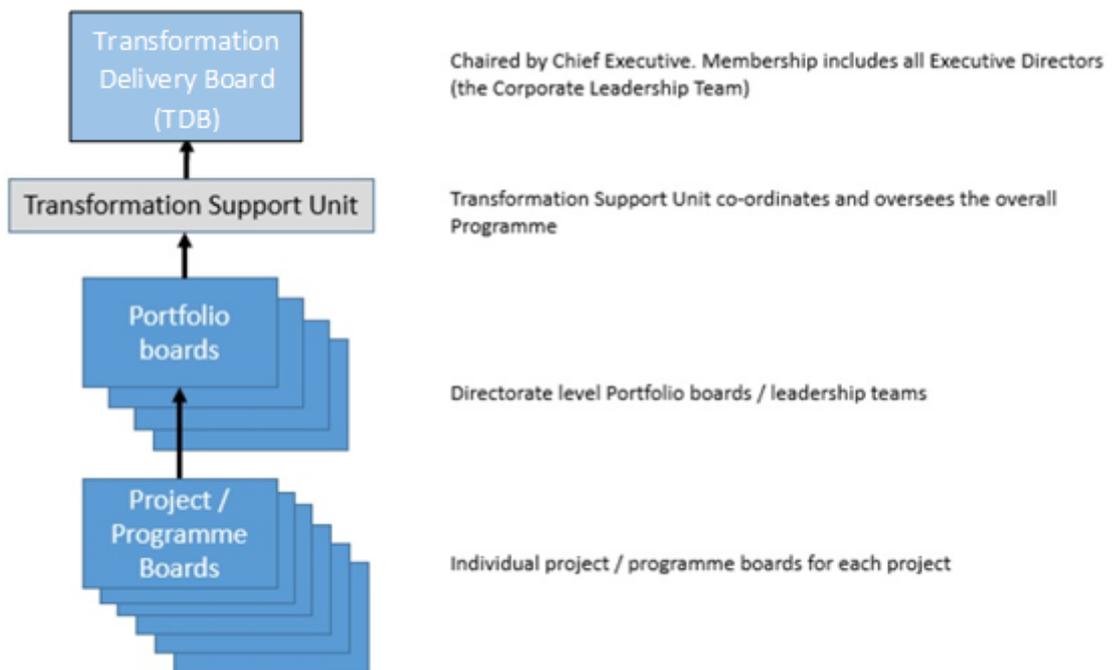
Ambition

5. Transformation on this scale represents a new and complex challenge for the council. The programme is delivering an ambitious and far reaching portfolio of change projects that address a range of fundamental issues the council faces in responding to the changing needs and expectations of residents and communities. We are already becoming a very different organisation, working in new and innovative ways with our residents and partners to achieve the ambitions in our Community Vision for Surrey in 2030.
6. Our transformative work is already making a significant contribution to required savings and demand management. This is much more than a savings programme or even a collection of projects and programmes.

Progress so far

7. At the heart of the transformation programme we have and are putting in place very different service models and approaches that can help prevent problems earlier and better support residents and communities to be independent.
8. A robust officer governance structure (**Fig. 1**, below) is in place to ensure that the projects within the programme deliver their projected benefits. Members are able to scrutinise progress through portfolio meetings, Cabinet and updates to the relevant Select Committees.

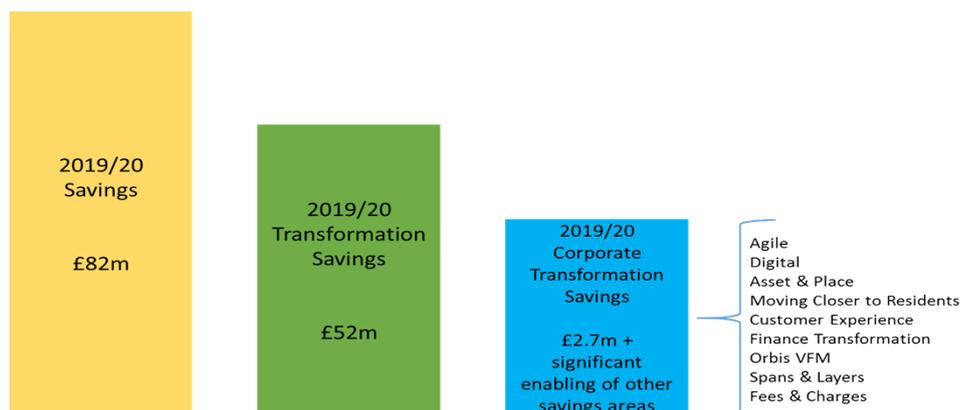
Fig. 1 – Transformation Governance Structure



9. The transformation programme achieved £12m of savings in 2018/19. The transformation savings target in 2019/20 is £52m and the overall investment in transformation is £31.4 million over the three financial years until March 2021. Both the investment and saving were approved as part of the MTFs and overall Council budget for 2019/20.

10. Both costs and benefits are scrutinised by officers and Members through the transformation governance set out above. These are also tracked as part of monthly budget monitoring alongside wider, non-transformation savings programmes.
11. **Fig. 2** below outlines the 2019/20 Council and transformation savings targets in addition to savings for projects and programmes that sit in the remit of the Resources and Performance Select Committee.

Fig. 2 – 2019/20 Transformation savings targets



12. Alongside the financial benefits already delivered and in train, a range of major service benefits have also been achieved. Some examples are outlined below.
13. Our Customer Experience programme has driven a range of innovations including successfully redesigning the council's online pothole and carriageway defect reporting. This is a significant priority for residents and we have made the process more streamlined while adding the facility to upload photos of defects. Feedback received to date has been very positive and the new system has resulted in an increase in people using the service, which is improving resident opinions of the council's response to potholes, while providing valuable information to assist our routine maintenance programmes.
14. We have delivered a Single Point of Access (C-SPA) in the contact centre as part of widespread changes to the way we deliver children's services. Service users are now able to contact a single support team with any query in relation to children's services, meaning that time and effort is no longer lost in trying to contact a particular person or team. There is encouraging evidence that this new service is having a positive impact and this was reflected by Ofsted following their monitoring visit in June '19.
15. As part of the Agile programme, Gov WiFi has been implemented across the council, allowing other partners to automatically connect when visiting a council site. Staff and members are also able to access this service from any other site where Gov WiFi is available. The upgrade of council computers to new Windows 10 devices is being rolled out as part of the Agile programme and this will be a priority in

the forthcoming period to support agile working and cyber security. It will also mean that future upgrades can be undertaken remotely which represents a future saving of £50 per device.

16. The Digital programme has created the capability to have a single view of information which has been progressed by establishing the core technology platforms to match data across multiple IT systems. The first 'single view' dataset to pilot this is in development to support the transition of data from Children's to Adult Social Care.

Corporate project/programme updates

15. Within the transformation programme there are a sub-set of projects that are acting as key "enablers" to transformative changes in frontline services. These sit within the remit of the Resources and Performance Select Committee (please note that Orbis, which is in this committee's remit, is subject to a separate detailed report on this meeting's agenda). The key projects are set out below along with some headline points on progress and next steps. The latest "Red, Amber, Green, Blue" status for each project is shown in brackets.

Customer Experience

16. Work continues to deliver a 'single front door' for customer interactions and for services to be 'digital by design'. A Children's Services single point of access has been delivered, as has a redesign of the highways reporting process. Feedback received to date suggests that 35% more customers are now being retained in the customer journey (i.e. no longer dropping out of a process/giving up halfway through), and that service users find the new systems easier to use.
17. Priority activities in the next six months include improvements to the family information service (FIS), children's social care and SEND Local Offer websites and digital pathways. There is also work planned to improve online self-service options for coroner services. (Current status: Amber – a number of new online processes have been implemented and positive feedback received. Interdependencies with other transformation projects and wider changes in the organisation mean renewed focus is required to deliver all outputs for 20/21).
18. It is proposed that the Resources and Performance Select Committee undertakes a "deep dive" piece of work on the customer programme to help shape the next phase of work.

Finance Transformation

19. This project aimed to build a culture of stronger financial discipline among the council's budget holders, build Members' confidence in financial management, improve the systems and processes used to generate financial data and build the skills and capabilities of the Finance function.

20. A restructure of the Finance Team has been completed and 'go live' is planned for 1 November '19. A Partnership Agreement, outlining how the Finance Team will work with services, is currently being embedded within the organisation's processes. The development of the Finance Academy – an offer from finance to improve financial capability and capacity across the organisation - is progressing in preparation for full launch in November '19. (Current status: Blue/Delivered – restructure has been implemented, activities have transitioned to BAU and closure agreed).

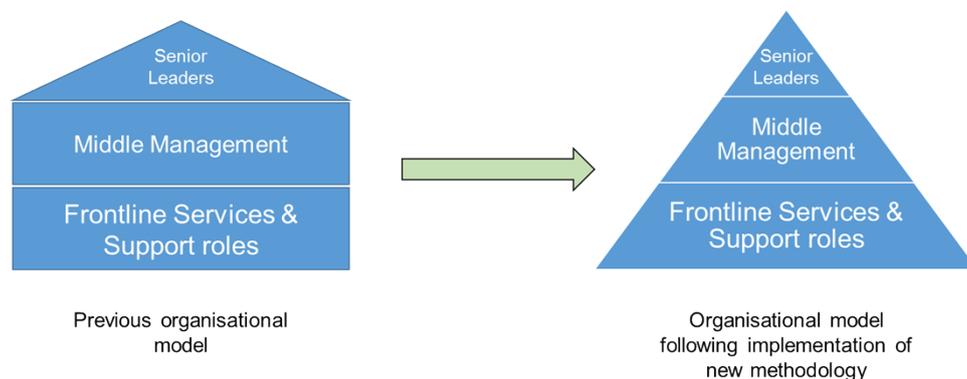
Digital

21. The digital programme is seeking to design, develop and drive our digital capability as an organisation. By enhancing our digital literacy and using digital as a key component in redesigning our services and ways of working, this programme will kick start a fundamental transformation of what we do and how we operate.
22. The focus of the initial phase of the programme has been building and putting in place improved functionality and capabilities to enable this shift to take place. The digital team have been working with services to understand the nature of the opportunity and have recently contracted a strategic partner, Rainmaker Solutions, to accelerate a number of emerging ideas to proof of concept phase.
23. We have additionally been improving some of our core digital functionality with an emphasis on making it easier and more straightforward for residents to interact with us digitally. A number of online reporting processes have been redesigned and the deployment of web chat has also been completed and proved to be popular with service users.
24. In Adult Social Care we have both improved online access to services and the ability to operate within a high demand environment. We have started to use robotics functionality to automate repetitive processes, freeing up staff time and improving the quality of services by tackling backlog tasks. We have also established the core technology required to match data across multiple IT systems, with the first deployment currently in progress to support the transition from Children's Services to Adult Social Care.
25. The programme team have started to work closely with colleagues in the insight team and are starting to establish better foundations to share data and insight and transform our ability to undertake more sophisticated and comprehensive analysis of the data that we and our partners hold. (Current status: Amber – some outputs have been delivered and a solid foundation for going forward established, though owing to wider changes across the organisation full benefits are yet to be realised. An increased focus on delivery will take place in 20/21).

Spans and Layers

26. This project has established a more consistent approach to organisational design by embedding principles including a reduction in manager roles and reducing the number of layers between senior manager and front-line posts
27. Prior to this project there were no organisation-wide standards or guidance as to how the council should be structured. This resulted in there being inconsistencies as to how individual teams were designed and consequently, there being up to nine layers between the CEO and front line services. The output of this project has been to create a leaner organisational structure with fewer middle-management posts, based on an established methodology. Fig. 3 below outlines this change.

Fig. 3 – Previous organisational model vs. new organisational model



28. This methodology has already been incorporated into the new Highways and Finance structures and will be utilised in all upcoming staff restructures. Benefits have already been realised in Phase 1 of the Highways restructure, which has delivered a reduction in spans and layers and a saving of £1 million.
29. As this methodology is rolled out across the organisation it will realise a reduction in overall payroll costs, as is already being experienced when comparing baseline salary costs year on year. Average spans of control have also risen and will continue to do so (Current status: Blue/Delivered – outputs have been achieved and implemented).

Agile

30. The agile programme aims to create the conditions that enable our workforce to work in a fully flexible, collaborative way, maximise productivity and drive up our overall organisational effectiveness. The programme has initially focused on putting the foundations in place to enable this shift, but has the broader, longer term aim to enable a more fundamental transformation in the way that all staff work. It is a key enabler to support the physical move from County Hall as part of 'Moving Closer to Residents', but this programme's impact goes far beyond that project alone.
31. The initial phase of the programme has been to secure the right infrastructure and equipment to ensure the wider aims of the programme are supported by reliable technology that the workforce has confidence in. New devices (including hybrids) have been rolled

out. Feedback received to date regarding the use of these new devices has been positive, with staff welcoming the additional security and confidentiality they bring. The viability of smaller devices for other workers (such as those on highways and other community workers) is also currently being tested.

32. Other key changes underway are the introduction of 'Gov wifi' and 'Always On', both of which enhance Wi-Fi access to enable employees and Members to access stable and reliable networks from a wider variety of locations. We are currently mid-way through the implementation of a systems upgrade which will improve access to a broader range of software. In turn, this will enable easier secure sharing of documents and access to collaboration tools, making the more collaborative working practices needed to be a truly 'agile workforce' closer.
33. The next phase of work will be focused on ensuring that the Moving Closer to Residents programme is supported and that the workforce have access to the appropriate collaboration, technology and cultural tools and are supported to use them effectively to drive the cultural change we are aspiring to achieve. (Current status: Amber/Red – Progress is being made and building blocks for future work are in place. Operational/BAU activities require careful management so as to not impact on transformation work. Greater alignment with Moving Closer to Residents programme is a priority).

Future direction of the programme

34. As with all large scale and dynamic change programmes, it is important to continue to flex and adapt to ensure that they continue to meet strategic objectives and the changing operating environment. As such, we have committed to review and as necessary refresh our transformation programme approximately every six months. The next refresh is taking place over the autumn period and is reasonably significant as:
 - A number of existing projects / programmes are nearing completion in their current form
 - There are a number of emerging priorities that will benefit from using a structured transformation approach
 - We are getting to grips with the changing context in which we operate and the future scenarios we might face
 - As a council we are in a different place to this time last year. Having delivered a range of positive outcomes over the last year in order to stabilise, we are now starting to look ahead to the medium term, setting our strategic direction and ambitions for the organisation in the context of Vision 2030.
35. This work is important in that it will build the next phase of transformation. It will be guided by and will respond to the stated ambitions for the council and any refresh to the organisation strategy. The direction of the refreshed transformation programme will be presented to Cabinet on 29 October 2019. The Select Committee will receive a further progress update once this has been agreed.

Conclusions:

36. The council's transformation programme has already made great strides towards ensuring we have a financially sustainable budget while meeting the changing demands and expectations of residents – though there is more significant work ahead. With the refresh of the transformation programme to support our medium term strategy, we are confident that as an organisation, we are on the correct trajectory towards delivering on our ambitions and Vision to 2030.

Recommendations:

37. It is recommended that Select Committee:
- a) Note the overall progress on transformation to date
 - b) Consider the key enabling projects within the remit of the committee and agree what role to play in supporting and scrutinising key projects
 - c) Note the refresh of the Transformation programme over the autumn period.
 - d) Agree to undertake a “deep dive” into the customer services programme at a future meeting.

Next steps:

- The Committee to complete a more detailed “deep dive” review of the customer services programme at its next meeting.
- The Committee will review a further update on the overall council-wide transformation programme in six months' time (April '20).

Report contact: Michael Coughlin, (Executive Director of Transformation, Prosperity and Partnerships)/Marie Snelling (Director of Transformation)

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Sources/background papers: [Community Vision for Surrey in 2030](#).

OUR FOCUS FOR THE NEXT 5 YEARS

2020 - 2025

ORGANISATION STRATEGY

HELPING TO DELIVER THE COMMUNITY VISION FOR SURREY BY 2030



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FOREWORD



I am pleased to introduce this strategy which sets out our contribution to the Community Vision for Surrey in 2030.

The Vision is a collective ambition to make Surrey a uniquely special place for people to live and learn, and where no one is left behind.

Since I became Leader last year, we have made tremendous progress to put solid foundations in place to begin transforming the council. We are looking to the future with renewed optimism and energy. We have set ourselves an ambitious programme of transformational change within this

County Council that both reflects the challenges and opportunities of the modern age, and supports investment in the future generations of this great county.

Our relationships with partners go from strength to strength, such as the significant progress we have made with our health partners around the greater integration of health and social care services, reflected through the unprecedented collaboration in developing Surrey's Health and Wellbeing Strategy.

However, our work is never finished and we need to do more to achieve our collective aspirations for the county.

Along with other local authorities across the UK, we face unprecedented challenges, including dwindling resources and growing demand for our services, that impact on our ability to secure better outcomes for residents.

We must therefore respond to these challenges and adapt to ensure the county is fit for the future.

This means our approach must focus on:

- Working with partners and residents to strengthen and improve what we do and be more resilient to future challenges
- Improving how we engage with residents, working in a more agile way and embedding the council in the heart of our communities
- Tackling inequality of life expectancy and improving quality of life for everyone to ensure no one is left behind.

I want Surrey County Council to be recognised as the leading county council in England, fit for the future and raising the bar in terms of the quality of outcomes we can secure with residents. How we meet the challenges facing us, and take advantage of the opportunities available, will be key in us achieving that goal.

On the right are the eight things we need to focus on over the next five years to achieve our ambitions.

I look forward to working with you – residents, partners, Members and staff – to support the Vision and the people of this county to maximise their potential, and achieve a better quality of life for all.

Tim Oliver
Leader of the Council

We are being proactive in tackling the climate emergency and will lead by example through a practical and proactive response. Through our work, and by working with partners and residents, we aim to become a carbon-neutral county as soon as possible and create a greener future for the county.



We will focus on stronger partnerships with residents, businesses, partners and communities to collectively meet challenges and take opportunities.



We will support residents' independence and help them to help themselves and each other within their communities.



We will speed up plans with partners to join up health and social care by integrating services so residents get more effective, efficient and seamless services.



We will make the most of digital technology to change how we work and innovate and improve our services to help Surrey and its residents thrive.



We will support the local economy to be strong and resilient, by investing in the infrastructure Surrey needs.



We will work with residents in every area of Surrey to identify and address causes of inequality, especially in life expectancy.



We will embrace diversity in Surrey to ensure the county is a place full of opportunity for everyone by recognising the benefits of a diverse population and workforce.



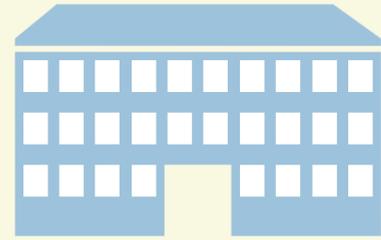
CONTEXT

As a place, Surrey has a range of unique features and qualities that can create different challenges and opportunities. The statistics on the right set these in context.



Population

- Surrey has a population of 1.19 million and is the twelfth most populous English county
- By 2030 expected to be 1.26 million
- Growing ageing population by 2030 over 22% of residents will be aged 65 and over
- By 2030 47% of residents aged 65 and over will be living in a care home
- The current population is largely healthy and active
- Upwards trend in life expectancy for men and women



Education and skills

- More than 380 schools in Surrey serving around 157,000 children and young people of compulsory school age
- Good performing schools 94% Surrey schools good or outstanding highest in the South East
- Highly qualified workforce Over 50% of working age population (16 – 64 year olds) hold a degree-level qualification
- Over 50% of people leave for study and do not return for employment - significantly higher than the National average

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Health and wellbeing

- Increasing demands on services for vulnerable adults and children + children with additional needs
- Affluent with pockets of social deprivation that has increased between 2010 and 2015
- 25 most deprived neighbourhoods in Surrey are also within the third most deprived areas in the county
- Increased food bank usage 2 in 5 emergency food supplies are for children



Housing

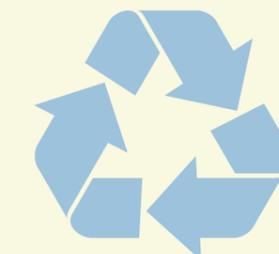
- Increasingly expensive housing
- Average house price £430,000 increase of 35% over the last 4 years
- Markedly less affordable housing than other areas in the South East
- Growing need for affordable housing especially for residents on low incomes
- Increasing homelessness and fuel poverty



Crime

- Rising crime Number of crimes recorded second highest rate in the South East
- Greater than regional average increase in recorded burglary, criminal damage and drug offences and significant increases in robbery and violent crime.
- Domestic abuse is a growing problem 3,837 [2015/16] New referrals to domestic abuse outreach services
- Domestic abuse factors in 1/3 of child protection plans [2015 review]

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Environment and Infrastructure

- Surrey's road network is a high priority topic for residents
- Surrey has one of the busiest road networks in the country, which carry double the national average and have the greatest average delay on the roads out of all counties
- Greener roads CO2 levels across the whole of Surrey's road network have been falling year-on-year since 2005
- Tonnage of waste collection risen almost every year and increase in total household waste being recycled
- Residents have good access to woodland spaces



Economy

- A strong economy worth £40 billion, which grew by 23% between 2010 and 2017 - in line with economic growth in the South.
- High and increasing earnings with a high disposable household income £27,865 per head per year
- An attractive and popular place for businesses Number of business per 10,000 population in Surrey has increased by c.37% between 2010 and 2017.
- Falling employment rate lower unemployment rate than the South East since 2004.

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Equality Impact Assessment (EIA)



1. Topic of assessment

EIA title	Customer Experience
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EIA author	Carole Comfort
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2. Approval

	Name	Date approved
Approved by	Michael Coughlin (Executive Director, Customer, Digital and Transformation)	14 January 2019
Approved by	Charlotte Morley (Cabinet Member for Corporate Support)	16 January 2019

3. Quality control

Version number	1	EIA completed	14 January 2019
Date saved	14/01/19	EIA published	21 January 2019

4. EIA team

Name	Job title	Organisation	Team role
Carole Comfort	Project Lead	Surrey County Council	Customer Services
Susan Grizzelle	Customer Services Group Manager	Surrey County Council	Customer Services
Sarah Baker / Janet Polley / Deborah Chantler	Legal Services Manager / Senior Principal Solicitors	SCC	Legal Advice
Adam Whittaker	Policy and Strategic Partnerships Manager	SCC	Advice

5. Explaining the matter being assessed

What policy, function or service is being introduced or reviewed?

As part of the transformation programme which Surrey County Council is undertaking, there is a drive to change the way in which residents can contact the council and access some of its services.

Through the promotion of digital and self-service options and the expansion of the established front door model, the requirement for consistent and cost effective access to council services will be met.

This increased use of digital and expansion of the front door together entail the Customer Experience programme.

The council's Organisational Strategy 2019-2023 identifies that to keep up with the digital demands of society we need faster, quicker and better public services available through multiple channels and devices.

It further states the council's commitment to get better at seeing things from a resident's perspective, giving customers a more consistent experience while reducing costs. It identifies that currently customers have to transact, interact and get information from the council in a number of different ways and that an improved customer experience will be created by streamlining and simplifying this to a single point of contact where appropriate.

Initial scoping has identified the following as potential opportunities to bring new services into the existing front door model:

- Children's MASH
- SEND
- Adult's triage
- Adult's MASH
- Coroner
- Online school wait list checker (digital)
- Online bus pass system (digital)

What proposals are you assessing?

The contact centre operates as the front door to the majority of council services. In order to realise required efficiency savings, and provide customers with more flexibility and control in the way they contact the council, it would like to deliver services digitally wherever possible.

Working with our partners in IT& Digital to identify options to improve the ability of customers to self-help and self-serve, we can provide economy of scale for the council and free up more costly specialist officer time within services.

The strategy is being assessed to serve as an overarching policy when considering any proposals to withdraw or reduce mediated telephone access to services via the council's contact centre. Additional EIAs will be carried out on a service by service basis as and when individual proposals are made.

This model will also allow us to focus our most expensive methods of communication, e.g. telephone, for our most vulnerable residents and customers, add most value and ensure we do not exclude those who are not digitally enabled.

<p>Who is affected by the proposals outlined above?</p>	<p>Centralising enquiry management by expanding the existing single front door model will deliver economy of scale and an improved, consistent customer experience. It will enable a more transformative change to the provision of self-service options through utilising enhanced technology.</p> <p>It will also enable a comprehensive and joined up picture of Surrey residents and customers. Customer insight and feedback gathered by customer services in a centralised performance management framework will ensure that the customer is at heart of service delivery and policy change.</p> <p>The Customer Experience strategy supports customers to self-serve wherever possible. The aim is to provide customers with more flexibility, choice and control over when they can contact us while at the same time realise efficiency savings</p>
	<p>All customers who currently access those services which will have their point of access changed as a result of the expanded front door, as well as those who chose to telephone the contact centre in order to access council services (as these services will largely move to digital platforms).</p> <p>Any savings associated with staffing reductions will be achieved by natural wastage wherever possible, therefore these proposals are unlikely impact on staff.</p> <p>Additional EIAs will be undertaken, where necessary, as and when specific proposals are received for services coming into the single front door.</p>

6. Sources of information

Engagement carried out

Engagement and consultation will be carried out with customers as necessary, as and when individual proposals are made..

Data used

The contact centre call logging system is used to identify the number of calls received by the contact centre on specific call types. Web data is analysed to identify levels of online uptake.

Surrey has a low rate of digital exclusion. Data indicates that there is an upward trend of customers preferring self-serve options for straightforward transactions (see graphs).

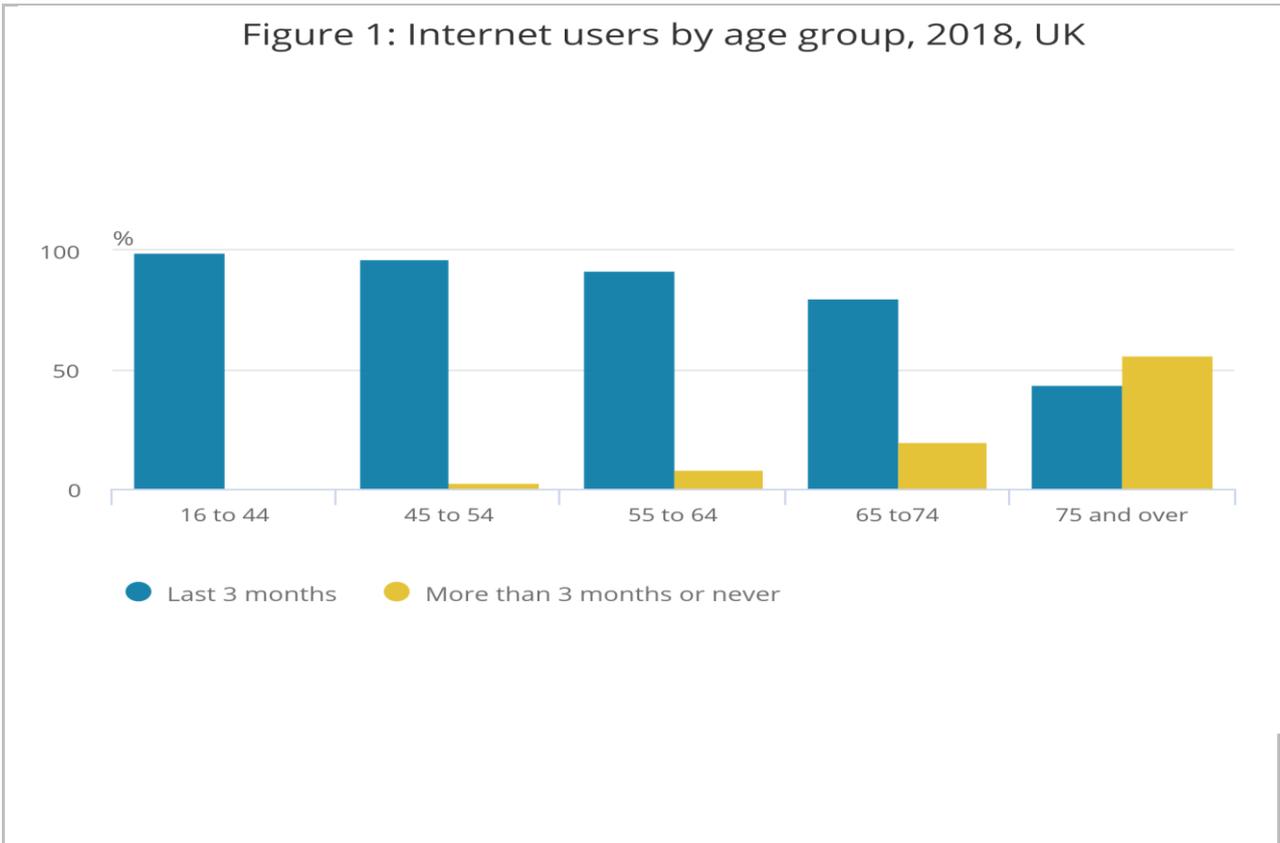
Data on digital inclusion*:

- 93.4% of adults in Surrey go online regularly
- 77%-80% (3% variance between districts and boroughs) of Surrey residents have all 5 digital skills needed to participate fully online, i.e.
 - Managing information – e.g. able to search for information and store data
 - Communicating – e.g. use email, instant messaging, post on forums
 - Transacting – e.g. order shopping
 - Problem solving – e.g. access support services such as live chat
 - Creating – e.g. create a text document, create a social media post
- 98% of premises in Surrey can receive broadband of at least 10mps, 85% of households can access superfast broadband
- Surrey County Council's website receives approximately 6.5 million visits each year, 36% of visits take place out of office hours
- In 2018 there was a larger difference in recent internet use for adults aged 75 years and over; 39% of disabled adults in this age group were recent internet users, compared with 49% of non-disabled adults**
- Overall, the proportion of recent internet users was lower for adults who were disabled compared with those who were not**
- Just over 7,000 people in Surrey either do not speak English well or at all

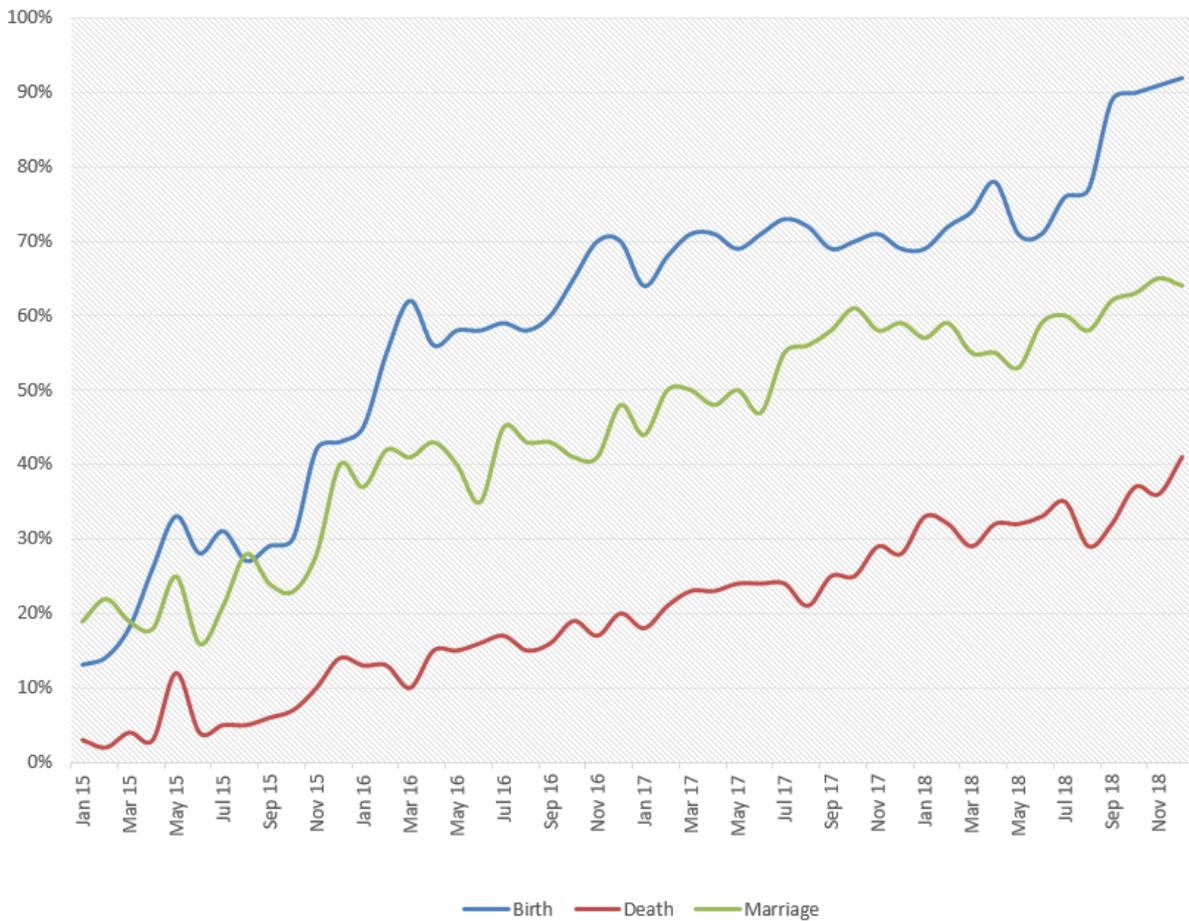
*Data obtained from Ofcom, ONS, DotEveryone, Surrey County Council, Surrey-i

**ONS Internet Users UK:2018

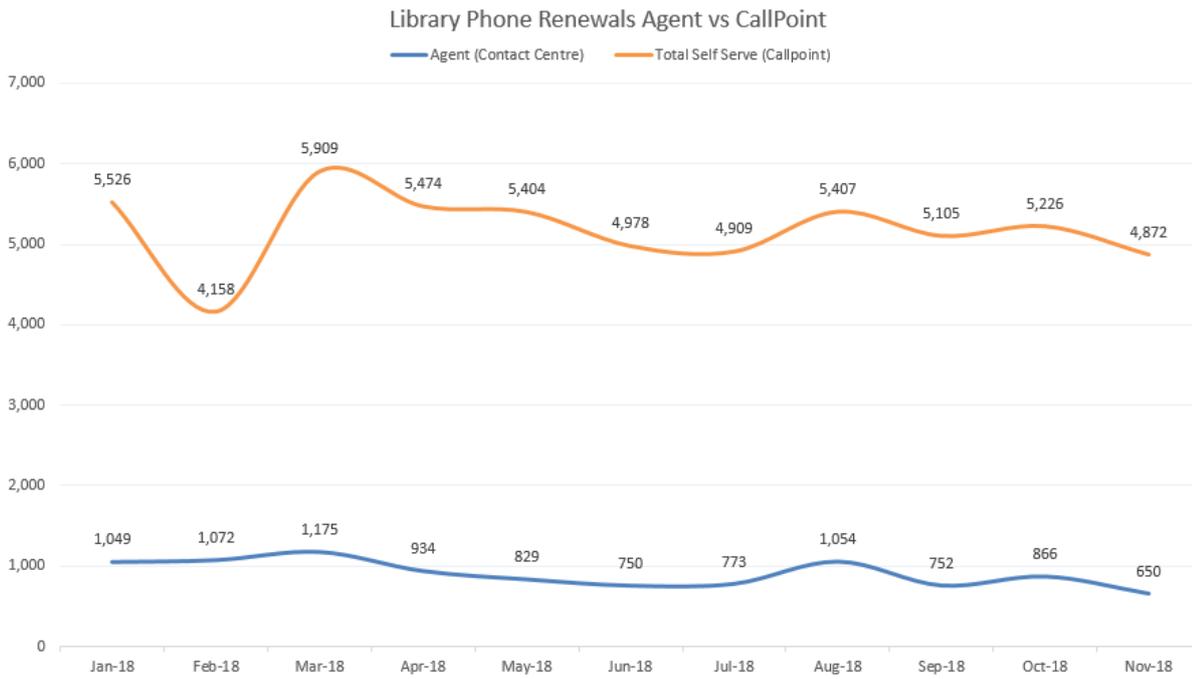
Figure 1: Internet users by age group, 2018, UK



Birth, Death and Marriage appointments booked online



Annex 7b – Customer Experience Equality Impact Assessment



7. Impact of the new/amended policy, service or function

7a. Impact of the proposals on residents and service users with protected characteristics

Protected characteristic	Potential positive impacts	Potential negative impacts	Evidence
Age	<p>People who prefer to self-serve will benefit from this policy. This may include younger people.</p> <p>A single point of access for all council services will make it easier for customers to access the information and services they need.</p>	<p>People who are digitally excluded will be impacted by this policy. This group may include older people.</p>	<p>Data shows (see point 6 above) that almost all adults age 16-54 regularly use the internet. This drops to 41% in those aged 75+.</p>
Disability	None	<p>People who are unable to self-serve will be impacted by this policy. This group may include people with certain types of disability.</p>	<p>Latest data (see point 6 above) from ONS states that 39% of adults with disabilities aged 75+ used the internet recently compared with 49% of non-disabled adults.</p>
Gender reassignment	None	None	None
Pregnancy and maternity	None	None	None
Race	None	<p>Some people who do not speak English as a first language may have difficulty understanding and/or following online or automated instructions.</p>	None
Religion and belief	None	None	None

Sex	None	None	None
Sexual orientation	None	None	None
Marriage and civil partnerships	None	None	None
Carers (protected by association)	This policy may assist carers to access services, advice and information at a time that best suits them.	None	None

7b. Impact of the proposals on staff with protected characteristics

Protected characteristic	Potential positive impacts	Potential negative impacts	Evidence
Age	None	None	None
Disability	None	None	None
Gender reassignment	None	None	None
Pregnancy and maternity	None	None	None
Race	None	None	None
Religion and belief	None	None	None
Sex	None	None	None
Sexual orientation	None	None	None

Annex 7b – Customer Experience Equality Impact Assessment

Marriage and civil partnerships	None	None	None
Carers (protected by association)	None	None	None

8. Amendments to the proposals

Change	Reason for change

9. Action plan

Potential impact (positive or negative)	Action needed to maximise positive impact or mitigate negative impact	By when	Owner
Customers will be able to access information and services from a single point channels across a range of contact channels.		N/A	N/A
The potential withdrawal of telephone based mediated access to some services will have a negative impact on customers who are digitally excluded and/or unable to self-serve. This group is most likely to include older people and people with disabilities	<p>We recognise that some of our customers may not be able to self-serve. Customers who are digitally excluded will still be able to contact the council through traditional methods such as telephone. The contact centre will provide instruction and support to any customers who experience difficulty in using digital or automated services.</p> <p>A discrete mediated service will be offered to vulnerable customers who are unable to self-serve, even with assistance. Although some customers may still require assistance from the contact centre this channel shift strategy will lead to an overall significant reduction in call volumes.</p> <p>Training will be provided to contact centre staff to ensure that vulnerable customers are correctly identified and provided with appropriate support and/or mediated access. The customer services in-house training team will</p>	Customers will receive additional support as, and when, required	N/A

	deliver this training to ensure take up by all staff.		
The withdrawal of telephone based mediated access to some services may have a negative impact on customers who do not speak English as a first language	<p>Customers who do not speak English as a first language may have difficulty in reading or understanding online instructions.</p> <p>The contact centre has access to a telephone interpretation service and would offer this as part of a mediated service to customers who are unable to use online or automated services due to language difficulties in the same way as they do at present.</p>	Customers will receive additional support as, and when, required	N/A
The proposed changes will provide an opportunity to raise awareness of the ability of the majority of Surrey residents, including those with protected characteristics, of 24/7 self-serve options for a number of transactions	Some residents and other customers may find it easier to use self-serve options. The channel shift strategy will help to promote online self-serve options which are available 24/7.	N/A	N/A

10. Potential negative impacts that cannot be mitigated

Potential negative impact	Protected characteristic(s) that could be affected

11. Summary of key impacts and actions

<p>Information and engagement underpinning equalities analysis</p>	<ul style="list-style-type: none"> • The communications team will be consulted to ensure that appropriate messaging is undertaken for each proposal that may impact customers, including those with protected characteristics. The approach for each proposal is likely to vary depending on what service is being considered. • Staff briefing sessions and training will be undertaken to ensure that vulnerable customers and those unable to self-serve due to digital exclusion are given appropriate assistance and support to access the services they need
<p>Key impacts (positive and/or negative) on people with protected characteristics</p>	<ul style="list-style-type: none"> • Residents who are digitally excluded, including older people and people with disabilities, will be impacted by these proposals. • People who have English as a second language may find it challenging to understand/follow online and/or automated instructions. • Opportunity to raise awareness of 24/7 self-serve options for a number of services which may benefit some people with protected characteristics.
<p>Changes you have made to the proposal as a result of the EIA</p>	<p>N/A</p>
<p>Key mitigating actions planned to address any outstanding negative impacts</p>	<ul style="list-style-type: none"> • A discreet mediated service will be offered by the contact centre to vulnerable customers, and customers who do not have English as a first language, if they are unable to self-serve, even with guidance and instruction. • Training will be provided to contact centre staff to ensure that vulnerable customers are correctly identified and provided with appropriate support and/or mediated access
<p>Potential negative impacts that cannot be mitigated</p>	<p>N/A</p>

Our purpose

Our purpose is to provide a consistent, high quality, resident focused experience and to champion and support the delivery of this throughout the organisation.

To achieve this, we will get better at seeing things from a resident's perspective, giving customers a more consistent experience while reducing costs. We will support the most vulnerable people in our communities and will encourage and enable increased independence where it is appropriate to do so.

We will actively engage with our customers to understand their current and future needs and the challenges they face, so we can deliver our services in a way that puts them first and enhances their experience of dealing with us.

We will also continue to make better use of technology to improve online self-serve options, as well as explore opportunities to deliver services differently. By encouraging and empowering those that can to access our services online at times and places that suit them, we will free up capacity to support those unable to use self-serve options to ensure that no one is left behind.

Our challenges and opportunities

We want our customers to have the best possible experience when they contact us, at a time when demand on our services is increasing and the resources available to us are reducing. We need to better manage customer expectations about the type of services we can provide and proactively inform customers about services and support available in the wider community and online. Use of new technologies will allow us to empower customers to help themselves through self-service.

Our key actions

Currently, customers transact, interact and get information from us through several different channels. We will create an improved customer experience by streamlining and simplifying this to a single point of contact where appropriate. This will help us get things right first time more often, as well as help shape demand for our services by proactively providing advice and information at an early stage.

To do this we will:

- champion and support the delivery of excellent customer service across the council
- provide an effective single point of contact to quickly and efficiently resolve customer enquiries and support residents to access appropriate services in the community
- use digital technology to improve customer experience and inform how residents and customers access our services, now and in the future
- actively use customer feedback and insight to drive service improvement
- manage Surrey's disabled parking scheme to allow residents with severe mobility problems to live more independent lives.

We will prioritise the following actions to support the delivery of the Community Vision for Surrey 2030:

1. Provide practical Customer Services support, guidance and training across the organisation.
2. Expand the single front door model for customer enquiry management to provide a consistent high quality service which is digital by design.
3. Improve the content, functionality and accessibility of our website to improve the self-serve offer and free up capacity for service delivery.
4. Implement new technologies so we can focus our most expensive methods of contact, i.e. telephone, on our most vulnerable or digitally excluded customers.
5. Engage with our customers to understand their needs and behaviours to inform improved customer journeys.

Our budget

£3.1m

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