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# Customer Journey Task & Finish Group - Final Report

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<b>Committee considering report:</b>	Overview and Scrutiny Management Commission
<b>Date of Committee:</b>	7 March 2023
<b>Task Group Chairman</b>	Councillor James Cole
<b>Date Task Group Chairman agreed report:</b>	13 February 2023
<b>Report Author:</b>	Gordon Oliver

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## 1 Purpose of the Report

- 1.1 This report presents the work undertaken by the Customer Journey Task and Finish Group and their final recommendations.
- 1.2 Members of the Task Group would like to thank all of the officers and Members who gave evidence and supported this scrutiny review.

## 2 Recommendation

- 2.1 To consider the Task and Finish Group's final proposals as outlined in Section 6 of this report and agree whether these be referred to the Executive for consideration.
- 2.2 To agree that the Overview and Scrutiny Management Commission keeps the issue of the Customer Journey under review, with reference to the work of the Customer First Programme Board (or its successor), and invites annual updates on progress in implementing the report's recommendations.

## 3 Implications and Impact Assessment

Implication	Commentary
<b>Financial:</b>	There are no financial implications arising directly from this report, although if proposals are accepted, this may result in financial implications which will be assessed in detail if they are taken forward.
<b>Human Resource:</b>	There are no HR implications arising directly from this report, although if proposals are accepted, this may result in HR

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	implications, which will be assessed in detail if they are taken forward.			
<b>Legal:</b>	There are no Legal implications arising directly from this report, although if proposals are accepted they may result in Legal implications which will be assessed in details if they are taken forward.			
<b>Risk Management:</b>	There are no risk management implications arising directly from this report, although if proposals are accepted, this may result in risk management implications, which will be assessed in detail if they are taken forward.			
<b>Property:</b>	There are no property implications arising directly from this report, although if proposals are accepted, this may result in property implications, which will be assessed in detail if they are taken forward.			
<b>Policy:</b>	There are no policy implications arising directly from this report, although if proposals are accepted, this may result in policy implications, which will be assessed in detail if they are taken forward.			
	<b>Positive</b>	<b>Neutral</b>	<b>Negative</b>	<b>Commentary</b>
<b>Equalities Impact:</b>				
<b>A</b> Are there any aspects of the proposed decision, including how it is delivered or accessed, that could impact on inequality?		X		There are no equalities implications arising directly from this report.

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<b>B</b> Will the proposed decision have an impact upon the lives of people with protected characteristics, including employees and service users?		X		The proposed decision does not have any impact upon the lives of people with protected characteristics. However, if accepted, proposals may improve the customer journey for disabled customers.
<b>Environmental Impact:</b>		X		There are no environmental impacts arising directly from this report.
<b>Health Impact:</b>		X		There are no health impacts arising directly from this report.
<b>ICT Impact:</b>		X		There are no ICT impacts arising directly from this report. However, if accepted, proposals would lead to improvements in ICT provision and would deliver benefits in terms of the customer experience and also in terms of more efficient working practices. Proposals would also have implications for ICT, the Contact Centre and the Out of Hours Service.
<b>Digital Services Impact:</b>		X		There are no Digital Services impacts arising directly from this report. However, if accepted, proposals would lead to improvements in digital services that would deliver benefits in terms of the customer experience and also in terms of more efficient working practices.
<b>Council Strategy Priorities:</b>		X		There are no impacts arising directly from this report, but if adopted, the report's recommendations would help to deliver aspects of the Council Strategy related to the priority 'Ensure Sustainable Services through Innovation and Partnerships'.
<b>Core Business:</b>		X		Improving the customer journey is part of the core business of delivering services.

<b>Data Impact:</b>		X		There are no data impacts associated with this report.
<b>Consultation and Engagement:</b>	See full details within the report.			

## 4 Executive Summary

- 4.1 The Overview and Scrutiny Management Commission (OSMC) established a Task and Finish Group to look at the customer journey across office hours and out-of-hours services.
- 4.2 The scope of the review was broken down into four main parts:
- Part 1: Out of Hours Emergency Contact Centre and Response
  - Part 2: Office hours customer contacts
  - Part 3: Office hours customer contacts (other local authorities)
  - Part 4: Good practice and recommendations
- 4.3 The Group has met 12 times between April 2022 and January 2023 and considered a range of evidence.
- 4.4 The Task Group has identified a number of recommendations arising from this work, which are set out in Section 6 of this report.

## 5 Supporting Information

### Introduction

- 5.1 The Overview and Scrutiny Management Commission (OSMC) established a Task and Finish Group to look at the customer journey across office hours and out-of-hours services. Terms of reference were drafted with the help of senior officers, and the scope was broken down into four main parts as follows:
- Part 1: Out of Hours Emergency Contact Centre and Response
  - Part 2: Office hours customer contacts
  - Part 3: Office hours customer contacts (other local authorities)
  - Part 4: Good practice and recommendations
- 5.2 The full Terms of Reference are provided in Appendix A.

## Background

5.3 The Task and Finish Group met 12 times between April 2022 and January 2023. Members considered a wide range of evidence and interviewed key witnesses as shown below.

*Table 5.1: Details of Task Group Meetings*

Meeting Date	Focus of Meeting	Witnesses
14 April 2022	<ul style="list-style-type: none"> <li>Review of the terms of reference</li> <li>Work planning</li> </ul>	N/A
25 April 2022	<ul style="list-style-type: none"> <li>Out of Hours Service</li> </ul>	Carolyn Richardson
17 May 2022	<ul style="list-style-type: none"> <li>Contact Centre</li> <li>Digital Services</li> </ul>	Sarah Clarke Gabrielle Mancini Sharon Ogden Phil Rumens
7 June 2022	<ul style="list-style-type: none"> <li>Interview with Chief Executive</li> <li>Residents' survey</li> <li>Engagement with town/parish councils</li> <li>Draft member survey</li> </ul>	Nigel Lynn Joseph Holmes Sarah Clarke Catalin Bogos
6 July 2022	<ul style="list-style-type: none"> <li>Member interview planning</li> <li>Disabled customers/Adult Social Care data</li> <li>Additional Out of Hours Service data</li> </ul>	N/A
25 July 2022	<ul style="list-style-type: none"> <li>Member interviews</li> </ul>	Cllr Alan Law Cllr Adrian Abbs Cllr Claire Rowles
9 August 2022	<ul style="list-style-type: none"> <li>Place Review – initial findings and next steps</li> <li>Mystery shopping – scoping</li> </ul>	Eric Owens Sean Murphy Anne Ewins
23 August 2022	<ul style="list-style-type: none"> <li>Adult Social Care presentation</li> <li>Complaints data</li> </ul>	Paul Coe
28 September 2022	<ul style="list-style-type: none"> <li>Review and work planning session</li> </ul>	N/A
31 October 2022	<ul style="list-style-type: none"> <li>Member Interview</li> <li>Environment presentation</li> </ul>	Cllr Hilary Cole Jon Winstanley
21 December 2022	<ul style="list-style-type: none"> <li>Place Review of customer demands and digitisation opportunities</li> <li>Place Review - update</li> <li>Planning Q&amp;A</li> </ul>	Sarah Clarke  Eric Owens
24 January 2023	<ul style="list-style-type: none"> <li>Out of Hours Incident Reports</li> <li>Out of Hours Mystery Shopping</li> <li>Place Review – further update</li> <li>Planning Q&amp;A (continued)</li> </ul>	Carolyn Richardson Eric Owens

5.4 An early focus of the review was the Out of Hours Emergency Service, and a preliminary report was brought to [OSMC on 22 May 2022](#).

5.5 The Task and Finish Group was originally due to present its final report to the OSMC meeting on 6 September 2022. This was initially deferred to the 29 November meeting, but a further delay was subsequently requested. Reasons for the extended timescales included:

- **Scope of the review** – the wide-ranging nature of the review meant that it was impossible to complete it within the timescales originally set;
- **Member availability** – there was a need to change membership part-way through the review - Cllr Adrian Abbs replaced Cllr Lee Dillon on the Task Group from August 2022;
- **Death of Her Majesty the Queen** – officers involved in supporting the task group and providing evidence were involved in organising local events;
- **Place Review** – the timescale for completion of the Place Review had to be extended by several weeks to allow for additional consultation;
- **Leave** – Members and officers had consecutive periods of leave during September and October, during which time meetings could not take place.

5.6 In light of the resultant delays, it was agreed that the Task Group should provide an interim report to the meeting on 29 November 2022. This built on the previous report on the Emergency Out of Hours service and set out the Task Group's findings at that time. This final report sets out the Task Groups findings and final recommendations.

## Findings

5.7 The findings of the Task and Finish Group are summarised below with reference to the questions contained in the Terms of Reference.

### Part 1: Out of Hours Emergency Centre and Response

5.8 Currently, an Emergency Out of Hours response is provided to respond to a wide range of situations. The most common of these include the following:

- Major incidents
- Social care emergencies, safeguarding concerns or homelessness
- Highways issues (e.g. fallen trees or traffic light failure)
- Flooding of properties and roads
- Emergency repairs to Council-owned temporary accommodation
- Lost and found dogs
- Car park issues

5.9 The Out of Hours Contact Centre is provided by an external contractor. The current provider is not local to West Berkshire, so staff may not be familiar with the area and

may struggle to identify the location of issues being reported, or the knock-on implications of these issues. However, it is acknowledged that this can also be an issue even for West Berkshire Council staff. It is noted that the contract is currently out to tender.

- 5.10 Bracknell Forest Council provides the Emergency Out of Hours service for social care emergencies, safeguarding concerns and homelessness on behalf of all the Berkshire unitary authorities. This is a highly specialist service provided by senior social workers.
- 5.11 The Public Protection Partnership has a dedicated Animal Warden Team, which deals with lost and found dogs on behalf of West Berkshire Council and Bracknell Forest Council.
- 5.12 The Parking Team has an emergency duty officer on call to deal with emergencies such as customers being unable to get out of the Kennet Centre Car Park after the car park has closed.
- 5.13 The Out of Hours (OOH) Contact Centre is not intended to replicate the full range of Council services, or even the services provided by the Council's own Contact Centre, since the cost of this would be prohibitive. The services provided are mostly statutory requirements or are provided to mitigate the risk of serious harm to individuals or property. The Task and Finish Group considered that this was an appropriate and proportionate approach.
- 5.14 Incidents can only be reported to the OOH Contact Centre over the phone – there is currently no option to do this via digital channels. This reflects the fact that they are emergencies and ensures that Contact Centre staff can ask questions of clarification about the incident and its location.
- 5.15 The telephone number for the Out of Hours Emergency Contact Centre is different to the Council's main office hours' number. Customers may not know this and dial the wrong number. The out of hours' number is given in the pre-recorded message played when the main number is called outside of normal office hours. Based on personal experience of recent incidents, the Task and Finish Group noted that it can be difficult for customers to make a note of this if they have no means of writing it down. Alternatively, customers can look up the number on the Council's website, but this may not be possible if calling from an area with a weak mobile data signal. The Task Group considered that having an IVR option that the customer can select to be transferred to the relevant OOH service would be helpful.
- 5.16 Although, the telephone number for the OOH Emergency Contact Centre is provided on the website, it requires customers to click on the 'Report a Problem' page or scroll to the bottom of the homepage and click on the 'Out of Hours Emergencies' link. Members have suggested that a pop-up banner deployed using a times script be used to automatically display the number of the OOH Emergency Contact Centre outside of office hours.
- 5.17 Previously, the message about reporting specific emergencies outside of normal office hours was not prominently displayed on the 'Report a Problem' page of the Council's website. As a result, customers sometimes missed it and tried to report urgent matters via the website rather than to the OOH Contact Centre by telephone. Reports submitted

in this way are not picked up until the next working day, which could be too late for critical events. This issue has already been addressed by the Digital Team in response to the Task Group's feedback, with a more prominent message displayed in a contrasting colour at the top of the page.

5.18 The Task Group considered that the OOH Contact Centre should be promoted more widely (e.g. parish council websites, noticeboards, newsletters) so residents are more aware of the service and can find the number easily. This would be beneficial for those who are not digitally enabled.

5.19 Members also suggested that search engine optimisation should be improved to ensure that the emergency out-of-hours number is automatically highlighted by a Bing / Google search. This has already been actioned by the Digital Team.

5.20 Customers calling the OOH Contact Centre are asked to select one of four options:

- Option 1 - to be redirected for concerns relating to social care for adults and children or homelessness
- Option 2 - to be redirected for lost or found dogs
- Option 3 - to be redirected to car park issues
- Option 4 - to be passed to a call handler for emergencies only

5.21 Statistics for the Out of Hours Service are provided in Appendix B. The initial pre-recorded message is quite long and takes just over a minute to complete. Statistics for the two year period 1 April 2020 to 31 March 2022 showed that over 3% of calls were abandoned during the first 60 seconds. It would be logical to assume that in most of these cases, the caller had decided that the issue they were reporting was not an emergency.

5.22 Just over 1 in 10 calls were abandoned without the customer speaking to an operator. Nearly 70% of these were abandoned beyond the first 60 seconds after the pre-recorded message had finished, with around 40% abandoned after 3 minutes. This suggests that some genuine emergencies may have gone unreported, or the caller had delayed reporting the issue.

5.23 Call statistics for the OOH Contact Centre showed that 68% of calls were answered within 30 seconds, with 81% answered within 90 seconds. This is broadly similar to those for the Council's own contact centre (see below). However, it would be reasonable to expect a quicker response for customers reporting an emergency, since the consequences of a delay may be serious.

5.24 Some day-to-day variation in performance is to be expected. For example, call numbers increase following major incidents that affect large numbers of people. However, resources are usually increased in anticipation of additional calls arising from known events such as storms.

5.25 Currently, residents have no way of knowing if an incident has been reported to the OOH Contact Centre and is already being dealt with, since there is no way for the OOH



Contact Centre to post to the Council's social media account or the website. This means that the service may receive multiple reports for the same incident, which could add unnecessarily to call wait times for those who are reporting other incidents. The Joint Emergency Planning Unit (JEPU) Service Manager has indicated that repeat reports are not commonplace, but Members noted that repeats may be more prevalent for certain types of incident, such as those identified below.

5.26 Members of the Task Group highlighted recent incidents, where weaknesses had been exposed in the Out of Hours response, including:

- A persistent alarm at York House (a Council owned building) which rang for over 60 hours over a weekend.
- Incidents related to planning enforcement, where there had been perceived delays in obtaining and serving the appropriate enforcement notices.

5.27 Copies of incident reports for these events were requested so Members could be assured that lessons were being learned and changes implemented.

5.28 For the York House incident, a variety of issues were identified and a comprehensive action plan has since been put in place to address these. Processes have been reviewed, training plans put in place, property / contact databases have been updated / expanded, and interim alarm contracts put in place. The main issue was in relation to services not providing key-holder updates to the contact information in the manual, despite monthly prompts to do so. Members noted the challenge in maintaining databases as a result staff leaving / moving jobs, but considered that processes could be revised so HR captured this information. Also, it was noted that customers had been promised call-backs, but this had not happened. Call-backs are not normally offered, but Members felt that this would be appropriate where issues were on-going and had not been resolved within expected timeframes. Members noted that, with the exception of the call-back offers, the response from the OOH Contact Centre was as per the processes set out in the OOH Manual.

5.29 For the incidents requiring Planning Enforcement action during Bank Holiday weekends, it was noted that despite the lack of an out of hours service, officers from Planning and Legal had responded quickly. Relevant officers were named in the Out of Hours Manual, and informal processes had been put in place so managers knew in advance who would be available to respond. As a result, action was taken as quickly as on a weekday out of hours scenario, and officers were on site within a few hours. Members acknowledged that any delay was in part due to courts not being open at weekends. Officers considered that the number of incidents did not justify the additional cost of a dedicated out of hours service. There was some discussion about OOH response times. It was noted that even if Planning Enforcement Officers were not available to respond immediately, the Development Manager and other Enforcement Officers could be called upon if necessary. Overall, the Task Group was satisfied with the response, but felt that there would be some benefit in formalising some of the processes.

5.30 A further concern was in relation to the number of Emergency Duty Officers (EDOs) across the Council. Numbers have reduced over time as officers have left or have indicated that they no longer wish to perform the role. The Task Group felt that this must be addressed in order to ensure ongoing resilience and to reduce the burden on those

that remain. The Task Group also felt that it would be beneficial for Members to have contact details for the duty EDO.

- 5.31 Mystery shopping is not currently routinely undertaken to test the Emergency Out of Hours Contact Centre. This was done previously, but lapsed during Covid due to a lack of resource. The Task Group was keen to test the processes for both of the above scenario types. However, this requires careful planning to avoid mobilising services and incurring costs. Unfortunately, tests had to be cancelled on two occasions due to unforeseen issues. Also, with the tendering process underway it was considered not the best time to undertake such tests.
- 5.32 As an alternative, calls will be monitored more closely as part of a short period of additional oversight. Also, the voice message for the Out of Hours Contact Centre will be modified under the new contract to indicate that customers may be contacted for feedback and to be compliant with the General Data Protection Regulations.
- 5.33 Consideration was given as to where responsibility for the OOH Contact Centre should sit within Council and whether this should be managed by the Council's Contact Centre Manager, since that individual would have relevant expertise. However, it was recognised that the JEPU Service Manager would still need to be closely involved to ensure that processes were kept up to date and reviews carried out following major incidents.

## **Part 2: Office Hours Customer Contacts**

- 5.34 Customers can currently contact the Council in a number of ways, including:
- In person
  - By phone
  - By email
  - Using an online form
  - Using the chatbot.

### Contact Centre

- 5.35 Despite a shift towards use of digital communications channels in recent years, the Contact Centre is still the main point of contact for many customers. Advisors operate the Council's switchboard and the Contact Centre also offers in person, telephone and email customer service on behalf of a range of Council services under a service level agreement, including:
- Revenues
  - Benefits
  - Planning
  - Streetcare

- Waste
- Children's Services
- Concessionary Fares
- Environmental Health
- Libraries
- Parking

5.36 Many of the above services have their own contact numbers, and residents are encouraged to use these to avoid double handling by the switchboard. However, this can be confusing for the customer, particularly where they have a need to deal with multiple services.

5.37 Contact centre advisors may be trained to answer queries for one or more of the above services. However, they generally deal with simpler, information-only queries. Calls that require technical advice are usually referred to professionals within the service. However, this excludes Revenues as the team discusses and sets payment arrangements, assists those in financial difficulty where cases have resulted in summonses and liability orders and discuss and agree Special Payments Arrangements. The team takes details of deaths, change of address, change of liability, change of payment methods as well as other general queries. These calls are rarely referred to the back office as reflected in the stats for resolution at the first point of contact. Also, Highways and Waste have information gathered and recorded.

5.38 Call volumes for the last two financial years are shown in Appendix C. This shows that the majority of calls were to the switchboard, Streetcare (including Waste), and Council Tax.

5.39 The table below shows how the Contact Centre's performance compares with some industry standard metrics<sup>1</sup>.

*Table 5.1: WBC Contact Centre Performance vs Industry Standards*

	<b>WBC Contact Centre</b>	<b>Industry Standard</b>
First contact resolution	85-90%	70-75%
Call answering	75-83% of calls answered within 90 seconds	80% of calls answered within 20 seconds
Call abandon rate	5-9%	2-5%

5.40 Although these industry standards for key metrics include call centres of commercial organisations and relate to 2018, they still provide useful context. The figures show that the Council's Contact Centre performs well on first contact resolution, but less so on call

<sup>1</sup> Standards provided by callcentrehelper.com (2018 data)

answering and the call abandon rate, although it is recognised that this performance reflected the vacancy rate at that time.

- 5.41 As would be expected, there may be significant variations within these statistics, subject to: call volumes, the complexity of the queries received, and advisor availability. Metrics for Q4 2021/22 showed that nearly all calls to the switchboard were answered within 90 seconds, but for some services, such as Council Tax, this figure dropped to around 50-60%. Also, first contact resolution statistics varied significantly between services. Queries about Benefits and Council Tax were most likely to be resolved first time (typically 95% or more), but figures were much lower for queries to Children's Services and Planning (between 29 and 56%).
- 5.42 The Contact Centre's target for call answering was relaxed from 80% of calls being answered within 30 seconds to 80% being answered within 90 seconds following the loss of two FTE staff in order to deliver savings. (The Task Group discovered a previous set of contact standards from 2015 that set a target of calls to the switchboard being answered within 15 seconds.) This change had also affected the average wait time for customers arriving at reception, which had increased from 8 to 10 minutes.
- 5.43 The Council recently adopted a Customer Charter, which promises to answer switchboard calls within two minutes and return messages within 24 hours. The Task Group was disappointed not to have been consulted on this prior to adoption, given that officers were aware of the Task Group.
- 5.44 Customers who have telephoned the Council are not told what position they are in the queue, or how long it is likely to take to answer their call. Systems that provide this information are considered industry best-practice and were introduced to reduce customer frustration. If a caller knows that they are likely to have a long wait, then they can make an informed decision as to whether they should remain on the call or try again at a different time when there may be less of a queue.
- 5.45 The Contact Centre generally attracts a low level of complaints (<0.1%) and staff regularly receive compliments from customers. However, the service does not routinely undertake mystery shopper or customer satisfaction surveys. A paid-for system was used previously, but the results were difficult to extract and analyse, so this system was not maintained.
- 5.46 Members reported that when they had rung the contact centre, the advisors had not always included 'West Berkshire Council' in their greeting. This was considered important to reassure customers that they had dialled the correct number. This issue has already been addressed by the Customer Service Manager.
- 5.47 The Council currently has an outdated phone system with a manual switchboard. Customers who ask to be put through to an individual officer are frustrated when the officer cannot take the call. Key issues include:
- The switchboard operator is unable to see in advance if the officer is available to take the call, or if they are in a meeting / on another call.
  - There is no option for the caller to return to the switchboard if the officer is unavailable. This is a particular source of irritation for some Members.

- There are no 'hunting groups' set up to divert the call to other team members if the first officer is unable to take the call.

5.48 The Council currently uses Openscape for voice calls. Most officers use this to divert their work number to their work mobiles and also to make calls through their work mobiles, even when in the office. However, some officers do not have work mobiles, which means that some calls end up leaving the Council's network entirely. Desk phones are available in the offices, but are rarely used by officers, particularly those who are used to remote working.

5.49 The Task Group learned that the Council was looking to implement a new phone system with an automated switchboard and an interactive voice response (IVR) system that would seek to address some of the issues identified above.

### Website

5.50 Use of the Council's website has increased significantly in recent years, which has helped to relieve demand on other channels. Website traffic is around 2.5 times higher now than in 2015, while the number of calls to the Contact Centre has remained broadly unchanged. Online interactions are undoubtedly more efficient and therefore cheaper than other forms of customer contact. However, they are not appropriate for all forms of contact (particularly customers with complex enquiries) and not all customers are comfortable in engaging in this way or have the skills or technology to be able to do so. Therefore, a multi-channel approach is still needed.

5.51 Key functions of the website include:

- Finding information
- Reporting problems
- Booking systems for events and household waste recycling centre visits
- Application forms and other online forms
- Taking payments
- Logins for different customer accounts

5.52 The Task Group highlighted perceived weaknesses with the website's search functionality (as confirmed by the Member survey and interviews – see below). Currently, only around 4% of visits to the website involve use of the search facility. Feedback on the search facility is actively sought, but in Q4 of 2021/22, just 56 people provided feedback to say that they could not find what they were looking for (0.13% of searches). Where feedback was provided, search functionality was improved. However, it is recognised that the search function will never be as comprehensive as that offered by proprietary search engines such as Google and Bing, which generate around half of all visits to the website.

5.53 The website has been the subject of a recent review. As a result, it has a completely new look, and the structure was the subject of a public consultation exercise. This has

been designed to help users to navigate the site and find information more easily. Initial feedback suggests that this has been successful.

- 5.54 Customers use a variety of different devices to access the Council's website, which presents its own challenges in terms of ensuring that information displays correctly and functionality is maintained. Currently, 51% of visits to the website are by mobile phone, 43% by desktop PCs and 6% via tablets.
- 5.55 The Task Group highlighted some issues with the new-look website, particularly in relation to accessibility tools and the navigation menu not being visible at all times. Also, it was considered that navigation was not as good as it could be for mobile phone users. However, it was accepted that the website had been designed in accordance with government guidance, which may differ to best practice for commercial organisations, and accessibility tools are generally built into the browser rather than part of the website. Councillor Adrian Abbs is an expert on website and user interface design and provided the Task Group with a detailed set of observations which were passed to the Digital Team.
- 5.56 Recent website successes included the move to digital permits for the recycling centres, as well as delivery of several major projects to support the response to the Covid pandemic, such as the Test and Trace Fund applications and Covid Winter Grant applications. Also, a chatbot has been introduced, which can be used to answer frequently asked questions. Initially, this had very limited functionality, but an apprentice has recently been appointed to develop this. There may be potential to consider use of AI services to enhance the chatbot in future.
- 5.57 A key focus for the Digital Team is improving the integration of the website with numerous third-party applications and websites to create a seamless experience for the customer. This can be supported through use of APIs. Also, the Task Group welcomed the move to provide customers with a single login for different services, although there is still some way to go with this, with multiple logins still required for various third party systems that are currently accessed via the Council's website.
- 5.58 The Member Survey also highlighted issues with the Council's intranet and it was suggested that this could be improved to better direct Member queries. For example Members felt that it would be useful to have up to date organisation charts on the Intranet. The Digital Team confirmed that a review of the intranet was underway, with services being asked to review and update their content.
- 5.59 Another point highlighted by the Member Surveys was the fact that Members did not know how to use the ModernGov system. Provision of training would help to improve their customer experience and would potentially save officer time in dealing with queries relating to meeting agendas and minutes.

### Provision for Disabled Customers

- 5.60 The Equality Act 2010 requires organisations to make reasonable adjustments to ensure as far as possible that people with disabilities can access the same services and facilities as someone who is not disabled. A person is considered to be disabled if they have a physical or mental impairment, which has a substantial and long-term adverse

effect on their ability to carry out normal day-to-day activities. These adjustments could be made by:

- Changing the way things are done
- Changing physical features
- Providing extra aids or services

5.61 Facilities and services that the Council currently provides for disabled customers, include:

- Accessible offices
- Accessible public toilets and changing facilities
- Assisted bin collections
- Blue badge parking
- British Sign Language (BSL) interpretation via video relay for deaf customers visiting the contact centre
- Easy read versions of some documents
- Hearing loop in the Council Chamber
- Captions for live-streamed public meetings
- Social care and respite care for disabled adults, young people and children
- Transport assistance, including concessionary fares for public transport, and provision of accessible taxis
- Provision of the West Berkshire Directory, which contains information for disabled adults and their carers, and for young people, families and professionals supporting families with Special Educational Needs and/or Disabilities (SEND)

5.62 OSMC previously received a suggestion that there should be live BSL interpretation of public meetings. This would be very labour intensive and costly to implement for all meetings as a matter of course. There is currently no requirement on local authorities to offer this service and no requests for such a service have been received. As an alternative, it may be that BSL interpretations of public meetings could be provided upon request. Further guidance will be provided by Central Government on the back of the BSL Act 2022.

5.63 Irrespective of any future guidance, the Task Group considered that it would be appropriate for the Council to produce BSL videos about key services. Hertfordshire County Council was identified as an example of where this has already been done<sup>2</sup>. It

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<sup>2</sup> <https://www.hertfordshire.gov.uk/accessibility/british-sign-language-bsl-videos.aspx>

is understood that Adult Social Care has looked at this previously, but has yet to progress it.

- 5.64 Similarly, considerations should be given to producing more 'easy read' versions of key documents and communications.
- 5.65 The Council has various forums for engaging with disabled customers, including the Learning Disability Partnership Board and Carers Support Group. However, the Task Group noted that the Disability External Scrutiny Board had lapsed following transfer of responsibility from the Council to Citizens Advice.
- 5.66 The Council also has contracts with Citizens Advice, Educafé, Eight Bells and Dementia Friendly West Berkshire which provide services, support and advocacy for disabled residents and service users.
- 5.67 The Council has recently undertaken a lot of work to inform its approach to equality, diversity and inclusion (EDI) and a consultant was appointed to progress this. A needs assessment has been completed which will sit alongside information from community engagement to form the evidence base that will help to inform priorities for further work, including improvements to provision for disabled residents and service users. This will be set out in a new EDI Framework, which is expected to be completed in summer 2023. Given that this work is progressing, there would be little benefit in the Task Group undertaking parallel engagement with disabled groups at this stage.

### Interviews with Council Departments

- 5.68 The Task Group undertook interviews with a number of individual Council departments. These were selected on the basis of:
- Number of customer contacts
  - Residents' Survey feedback (i.e. services where the highest proportion of residents consider that improvement are required)
  - Complaints data
- 5.69 Additionally, the review took account of the needs of elected councillors. As well as being a unique category of customers in their own right, they also had key insights about other customer journeys gained from correspondence with local residents and businesses.
- 5.70 A survey was sent to all West Berkshire Council Members and nine responses were received. In addition, four Members indicated that they wished to raise particular issues related to the customer journey with the Task and Finish Group directly, so a series of interviews were arranged. The results of the Member Survey are shown in Appendix D.
- 5.71 On this basis the following Council departments were selected for further investigation:
- Adult Social Care
  - Development and Regulation, and



- Environment.

### Adult Social Care

5.72 The review focused on care management where customers' experience is based on Commissioning and Procurement, external providers, and health partners, as well as ASC staff. Initial customer contact is mostly via the Contact Centre, and the Housing Team is also involved as necessary.

5.73 The ASC offer is determined by the Care Act 2014 - duties include:

- To prevent, reduce and delay the need for support (e.g. through provision of advice, equipment and practical support, or acting to help those at risk of falls so they do not incur injuries that would require care).
- To provide information about services available in the community.
- To undertake assessment of clients' eligibility for long-term support or carers' eligibility for support.
- To review clients with existing services to ensure they were still effective.
- To ensure that there are sufficient independent care providers in the market.

5.74 Other duties are set out in the Mental Health Act and the Mental Capacity Act.

5.75 ASC uses a 'Three Conversations' model with customers:

- 1) Information, advice, or short-term practical support
- 2) Managing the situation for people in crisis
- 3) Arranging long-term support / care

5.76 This is important in terms of managing the cost to the Council but also in ensuring that customers get the right response.

5.77 The service has adopted a strengths based approach based on what the person can do for themselves and is person-centred, seeking to understand what the customer wants / needs. There is a good crisis response with practical interventions to stabilise customers. The aim is to help people to take responsibility and manage themselves wherever they can and to only provide long-term care when absolutely necessary.

5.78 For clients who lack mental capacity to engage in assessment / safeguarding processes, ASC provides an independent advocate where there is no suitable friend / family member – this can be a slow process due to the lack of available advocates.

5.79 There are also particular challenges when young people with learning difficulties transition into adulthood. Often parents find this difficult, since they are no longer central to the process. Members highlighted the importance of communications to ensure that clients do not feel disenfranchised.

5.80 The ASC Service is organised in three localities – East, West and Central - based on the geography of GP practices and communications with GPs is generally good. Officers considered that this works better than the previous model, with one team looking after all people in an area rather than having different teams based on the particular needs of the individual.

5.81 ASC performance is reviewed on a monthly basis, with a quarterly paper to Corporate Board. Key metrics provided at the time of the interview are provided below:

- For community referrals, around 90% of customers received information, advice, equipment, while less than 6% received long-term services.
- For hospital discharges, more people needed long-term care
- Just under 300 people were on an ASC waiting list, with 37% waiting for over 3 months, but the trend was broadly improving
- Annual care reviews were just below the 70% target, but this was not considered critical, since customers were already receiving care and the most common outcome was for customers to continue receiving care at the same level

5.82 The Council is expected to take appropriate action to 'manage the market' and ensure that the care available locally is matched to demand in terms of the type and capacity, and examples were provided of conversations that had taken place with providers. The Council has published a market position statement, which sets out current provisions and gaps, and has had discussions with providers on the back of this.

5.83 Care homes must register with the Care Quality Commission (CQC) and meet their requirements. The CQC ensures that facilities are of an appropriate quality. Inspections flag any issues that the provider needs to address, and in exceptional circumstances, the CQC can close a care home. ASC's Care Quality Team talked regularly to the CQC about local providers, and as a care home provider the Council is also registered with and inspected by the CQC. Ratings are as follows:

- Notrees = 'good'
- Willows Edge = 'good'
- Reablement Service = 'good'
- Shared Lives Scheme = 'good'
- Birchwood = 'requires improvement'

5.84 There is a potential issue with 'capital depleted' individuals who place themselves in a care home and then run out of money. Numbers of 'capital depleted' clients are currently low (8-12 per year), but slowly growing.

5.85 In terms of the mechanics of customer interactions, customers use:

- An online directory of voluntary and commercial services in their community

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- Internet pages with advice and self-service forms
- A hardcopy care directory listing local providers
- Email
- Telephone

5.86 ASL has a dedicated number that routes customers via the Contact Centre. As mentioned previously, an automated switchboard that allowed customers to select the service they wanted could obviate the need for a separate number.

5.87 The Contact Centre provides an effective filter that removes non-ASC calls and is considered better than having a Front Door Team within ASC. After the initial call, customers are looked after by the relevant locality team.

5.88 Drop-in facilities are available at Market Street, Turnhams Green, Hillcroft and Walnut Close. The long-term aspiration is to have more of a High Street presence in eastern and central areas of the district, which would make it easier for customers to access information and advice. The Task Group supports this aspiration.

5.89 The Council contracts with a range of providers to deliver key services. Bracknell Forest Council is commissioned to provide an emergency out of hours ASC service, mostly for mental health crises, and allowed people to be assessed under the Mental Health Act. TuVida and CAB are commissioned to provide advice to local carers.

5.90 The Council is also part of a commissioning group (Berkshire Equipment Service) that contracts with NRS. The Council buys equipment directly from NRS or customers are directed to the service. NRS also offers a self-assessment service.

5.91 The task group asked about use of technology to support people to remain in their own homes. It was confirmed that while NRS provides and monitors motion sensors, many clients do not like them.

5.92 24/7 management cover is provided for the Council's own care homes, and also to support hospital discharge at the weekend.

5.93 In relation to domiciliary care, the in-house Reablement Service works with clients to build skills and manage their own lives successfully. The majority of care is commissioned through a range of providers. There is an accredited providers list and organised according to local geographical areas. It is acknowledged that there are not enough people doing care jobs and people living in remote areas are difficult to serve.

5.94 Members asked about the prevalence of modern slavery involving carers. While there is currently no evidence of cases in West Berkshire, it is acknowledged that this may go undetected. The Council has processes in place to handle modern slavery reports, but these are not owned by ASC. The Care Quality Team undertakes inspections (planned and unannounced) in addition to the CQC inspections. However, modern slavery is considered to be more likely in privately commissioned live-in care for individuals, which is not regulated.

- 5.95 Government reforms to Adult Social Care will have significant impacts, including a cap on care costs and the ability of self-funders to request that local authorities commissioned their care. Currently, most customers are given advice, information, support and short-term commissioned activity, with only a few receiving commissioned care. However, under planned reforms, many more customers are expected to ask the Council to commission their care, which will place significant additional demands on the service. Members noted that this could potentially impact on the customer experience unless capacity can be increased.
- 5.96 The ASC service is developing digital solutions to cope with the predicted increase in enquiries. The Council will be required to agree an independent personal budget for each client and the aim is to automate the process as far as possible. The Task Group highlighted that many older people are not online or are not confident using online services, and stressed that ASC services should not be digital only. This is recognised by officers and the intention is to build digital pathways for those who can use them, which will release capacity for face-to-face services for those who cannot.
- 5.97 Care Director (the care management IT system) is also being upgraded. This is key to modernising the service and improving efficiency, but is taking much longer than anticipated. It is hoped that the new version will be operational later this year.
- 5.98 Another key change will be the introduction of Care Quality Commission inspections of ASC services from 2023. This will provide a further check on performance.
- 5.99 Discharge from hospital is a key activity that affects the customer journey, with many people experiencing significant delays due to a lack of available care. ASC is in regular dialogue with the Royal Berkshire Hospital regarding hospital discharges. There are also link workers at North Hampshire and Great Western Hospitals. More recently, central government has announced additional funding to support hospital discharge.
- 5.100 The Task Group considered safeguarding issues. Statistics are reported quarterly to Corporate Board. In 93.7% of cases the risk is reduced or removed. However, in a small number of cases, customers do not want ASC to take action.
- 5.101 The Task Group asked Paul Coe about his main worries for the service. A key consideration for the service is the care delivered in the Council's own care homes, since that is wholly ASC's responsibility. Another key focus for ASC is tackling the waiting list, since that represents customers who need support, but are yet to receive a service. Members asked how waiting times compare to other local authorities. It was explained that there is not an easy way to work this out due differences in the monitoring methodologies. However, they are considered to be broadly similar.
- 5.102 The Survey of Adult Carers in England (SACE) is a statutory survey that is carried out every two years in accordance with national guidance. Results for 201/22 show that West Berkshire performs well in comparison with the England average. With the exception of Information and Advice Quality, West Berkshire is above the England average for all domains. Key actions being taken include provision of improved online services and updating the West Berkshire Directory in conjunction with Communities and Wellbeing.

5.103 The Adult Social Care Outcomes Framework measures highlights areas where performance has changed compared to previous years:

- 1B – The proportion of service users who feel they have control over their daily life has dropped, which is likely to be linked to the pandemic, particularly since the survey was sent out in January 2022 when the impact of the Omicron variant was being felt.
- 1L – The proportion of service users who report that they have as much social contact as they would like is up from last year but still down from pre COVID levels.
- 3A - Overall satisfaction with care and support is down slightly, but by less than 1%.
- 3D1 – The proportion of service users who find it easy to find information has improved and is above the England average, which is in contrast to feedback from the Carers' Survey.
- 4A – The proportion of users who feel safe has dropped by 7%, but this is impacted by issues wider than ASC.

5.104 A quick review of the qualitative responses to this question show that the majority of responses relate to:

- Concerns about falls / mobility
- Mental health and anxiety issues are causing people to feel unsafe (possibly heightened by the pandemic and fear of going out having isolated for so long)
- Customers' environment (going out alone, going out at night, poor relationship with neighbours, security of their home).

5.105 Work has been progressed through the Ageing Well Task Group to support older people during the pandemic. Subsequently, the focus has been on:

- Covid recovery, engaging residents who are isolated or at risk of falling to increase confidence to get out again;
- Exploring falls data in light of the pandemic and looking at ways to further reduce the risk of falling
- Encouraging residents back to physical activities & social connection
- Ensuring those who are housebound have opportunities to be active and connected

#### Development and Regulation

5.106 The main focus of the review was on the Planning Service and particularly the Place Review.

- 5.107 In undertaking the Place Review, the consultants had looked at the customer journey for both planning applications and policy, and had met with developers and agents, but not with individual applicants.
- 5.108 Calls to the Planning Service come in through the Contact Centre. With over 8,000 calls per year, it is one of the more high-volume services. However, it has one of the lowest levels of first contact resolution, which is linked to the technical nature of customer enquiries. Calls that cannot be resolved are forwarded to the Duty Planning Officer for consideration.
- 5.109 As a result of the Place Review, the Planning Service is changing its approach to planning applications. Applicants are no longer given informal advice and are encouraged to seek formal pre-app advice.
- 5.110 The focus is now on front-loading applications. Previously, effort was focused on the determination phase, where officers negotiated on applications post-submission. This could take months of work, and tied up a lot of resource. Also, it did not produce the best applications. The move towards greater use of pre-app advice is in line with national guidance. This will help to speed up the process and will give more certainty to applicants, thus improving their customer journey.
- 5.111 To support the revised processes, the Planning Service has updated its web pages and guidance. For minor applications, one minor amendment is permitted, while for major applications, one round of changes is permitted. After that, the applicant is offered the choice to withdraw or have the application refused at which point they can decide if they want to appeal the decision.
- 5.112 Members highlighted a particular application that had been rejected as invalid, and noted that the additional information sought had conflicted with information provided on the website. It was stressed that advice on the website needed to be correct. Officers confirmed that a new planning application validation checklist is being developed, which should address this point.
- 5.113 Members highlighted an example of a customer journey where installation of solar panels at an office complex had required a full planning application, and consequently the management company had considered this too complicated and costly and had decided not to proceed. The challenge of insulating older properties was also highlighted. Members suggested that the Planning Service could work with the Environmental Delivery Team to offer a different, more integrated service.
- 5.114 The Task Group cited another example where a business owner was seeking to convert an office to a sui generis use. Despite being a relatively simple change, the applicant had been deterred by the complexity of the planning system, the need to engage a planning consultant and the cost of the process. Members suggested that the Council should provide more help (e.g. guidance, webinars, videos) to give confidence to people making simple applications. Officers stressed that, although recommended, there was no requirement to engage a planning agent, they accepted that additional guidance could be provided, and they stated that costs of applications and the need for planning permission were determined by legislation, use class orders, case law, etc.

- 5.115 The Task Group highlighted emerging legislation that will require better developer engagement with local communities, and suggested that developers could be encouraged to use apps to engage with local communities. These apps could potentially be integrated with the Council's website (subject to Digital Team resource) to provide updates on major developments in the area. It was noted that Watford Borough Council's website had a tab linking to information about all major developments in the local authority - a similar functionality is proposed for West Berkshire. This will help customers to self-serve for information requests. Members suggested that information could also be pushed to customers.
- 5.116 Suggestions were made about areas where the Council's website could provide better support for customers (for example, provide links to where customers can purchase a map or pay for a planning application).
- 5.117 Officers highlighted that 50% of first applications were invalid and that some agents had used this as a validation process. Members highlighted an application that had been rejected as invalid, but the additional information sought had conflicted with information provided on the website. It was stressed that advice on the website needed to be correct. Officers confirmed that a new planning application validation checklist was being developed.
- 5.118 In relation to the 'important dates' tab on the Planning Portal, Members suggested that it would be useful to provide: the date the orange notice was posted, the closing date for objections, and the date for Member call-in.
- 5.119 Officers highlighted that they were working on a tool that would allow customers to see live updates of where their application was in the process. As well as improving the customer journey, this will help to reduce the number of incoming calls. The validation letter currently advises customers not to call before 21 days had elapsed to allow for consultation responses to be received.
- 5.120 Members raised issues with orange notices being difficult to read and hard to find, particularly for large sites or where they are erected in locations that residents might not usually visit. While content is determined by legislation, officers confirmed that the format could be reviewed. Orange notices are often a source of conflict and have occasionally been removed by disgruntled stakeholders. Case officers are asked to take photos to show when and where they have been put up.
- 5.121 The Task Group highlighted that other customers included neighbours of applicants and parish / town councils. Neighbours are no longer notified by letter of nearby applications. While residents can register to be automatically notified by email of nearby applications, this does not cater for the needs of residents who are not digitally enabled. Members suggested that residents could be sent e-newsletters that dealt with topics of interest, including applications in their area. However, they would have to opt in to receive this. This would have to be linked to a wider communications piece.
- 5.122 Members highlighted that parish / town councils have concerns about the planning applications process and how their views had been taken into account as part of the Place Review. Officers provided reassurance that parish / town councils had been surveyed and actions were identified within the Service Improvement Plan to address

issues raised. For example, reports will be amended to better show how parish / town council comments on individual planning applications have been taken into account.

- 5.123 The Task Group highlighted an issue with the length of time that parish / town councils were given to consider and respond to planning applications. Some parish councils only met every two months, so had to arrange a special meeting if they wanted to comment on a particular application. Also, residents often got in touch with their parish council late in the consultation period, and parish councils had previously been able to request an extension of the consultation period.
- 5.124 Officers provided reassurance that consultees were given 21 days plus up to a further 14 days at the discretion of the planning authority. Also, any consultee would still be able to ask for an extension of the time period for submission of comments, as under the existing system. Advice and support had been offered to parish / town councils about the new arrangements, and around half had taken up the offer.
- 5.125 It was also highlighted that there was a need to balance engagement with the time taken to process the applications. The changes introduced were considered to provide increased transparency in how the service dealt with parish / town councils.
- 5.126 It was acknowledged that responding to new guidance on Nutrient Neutrality Zones had caused delays to determination of planning applications and a lack of staff resources had also contributed to delays.
- 5.127 The Task Group highlighted that under the new system, applications are removed from the inbox once parish / town councils submit their comments, but the parish / town councils may want to make further comments. Assurance was provided that any party can make comments up until the point that the report is written, but they may not be able to do this through the system. The Task Group considered that additional guidance should be provided within the new system to clarify that comments out of time could still be emailed.
- 5.128 The Task Group considered the use of Planning Advisory Groups (PAGs), which allowed engagement with residents. These are used by other local authorities for major developments, sometimes after planning permission has been granted and where there was some flexibility in relation to detail. A common complaint amongst town / parish councils is that they had no involvement in developments post-approval. Developers are mostly interested in realising a financial return, and have little interest in the design of communal aspects of the development, while residents wanted to be involved in the design of these aspects. An example was given of a development in Hungerford where the Town Council was taking a lead on landscaping. PAGs could provide a useful mechanism to engage all relevant parties to ensure they had an input.
- 5.129 There was some discussion of the Community Infrastructure Levy system and processes used by the Council. The Member interviews had highlighted issues that had arisen in relation to previous planning applications and it was suggested that the Planning Service could be more proactive in highlighting to customers where information was missing from forms.



## Environment

5.130 The Environment Department comprises the following services:

- Transport and Parking
- Network Management
- Asset Management
- Countryside Services
- Waste Management
- Environment Delivery

5.131 The Department does not have many customer-facing officers, and relies heavily on Contact Centre to deal with common enquiries and to filter calls.

5.132 Streetcare attracts the most Contact Centre enquiries of any Council service, which suggests that there may be opportunities to improve online information / services. The Department has a lot of information on the website, but little feedback is received from customers or the Digital Team. The Task Group suggested that the Digital Team could provide Google Analytics data for key Environment web pages. This would show where customers were arriving and how they were using the website. The information could be used to simplify and improve the customer journey. Also, the effects of changes to the website could be analysed. This is being actioned by officers.

5.133 Around 12,000 issues are reported each year via the 'report a problem' page on the Council's website each year. Officers have identified various issues with system based on customer feedback, including:

- Difficulty in determining the correct option for reporting particular problems (e.g. flooding)
- There is no information to guide the user, which can make it more difficult to submit the report and for the user to provide subsequent updates.
- Unnecessarily complicated reporting pathways that resulted in more clicks than is necessary.
- Existing reports not being shown on the map, which can result in duplicate reports being submitted.
- A limited number of address points being returned for postcode searches.
- Clicking on the map can sometimes result in a message incorrectly being displayed to say that the location is not within West Berkshire.
- There is no option to attach photos of the problem.

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- It is not linked to Volker's systems, so queries have to be closed when they are passed to the contractor.
- Customers cannot track progress with their reported problems
- There is only limited use of data for asset management purposes.

5.134 The Task Group explored a particular customer journey with officers where there have been difficulties in selecting the correct option and in submitting subsequent updates in relation to the reported issue. It was acknowledged that the front page is not interactive and the categories could be made clearer. It was suggested that the number of clicks could be reduced by having a range of problems on the front page with icons to provide visual clues to the customer, similar to the system used by Devon County Council. It was also suggested that help buttons could be provided to provide the customer with additional information about each option.

5.135 The 'report a problem' page is being replaced with a new proprietary system, which will address many of the above issues, giving an end-to-end customer journey. It will be also be linked to the Council's asset management system to allow customers to select individual items that are faulty. The new system has already been rolled out for potholes, highway, drainage and street-lighting issues and will be rolled out to Countryside, Transport and Parking later this year. Further improvements will be delivered when Volker Highways updates their system. The new 'report a problem' system will include a customer satisfaction tool and KPIs will be developed for this.

5.136 Members suggested that assets belonging to town / parish councils should be identified on the 'report a problem' system, and that customers could be informed of who they needed to contact if the asset did not belong to West Berkshire Council. This is being progressed and will be rolled out later this year.

5.137 Out of office hours, calls are handled by the Out of Hours Contact Centre. Also, duty Out of Hours officers are available for Highways, Parking and Transport. (The Transport Duty Officer is only required for public transport operating hours.) In addition, the Highways contractor has 24/7 cover as part of their contract. It was confirmed that there are sufficient numbers of officers available to provide cover.

5.138 Proactive communications with residents include the Environment Newsletter (4,200 circulation), project notifications, use of the One.network tool to highlight roadworks locations, use of the Commonplace consultation tool, and blogs for major works. However, Members considered that that the newsletter sign-up page was not easy to find on the website.

5.139 Various consultations have been carried out to seek residents' feedback. Areas of strong performance include: scheme specific consultation and engagement; customer facing transformation improvements; Environment Strategy engagement; and dealing with and keeping the customer informed about high volume, short duration service requests.

5.140 Areas where officers had identified communications could be improved included: providing proactive network management information (e.g. through the website, monthly newsletter, social media, etc); website content; mystery shopping; seeking customer

feedback; achieving a more consistent approach to customer service across the department; and managing longer duration enquiries.

5.141 The Council takes part in the National Highways and Transportation Network public satisfaction survey. This shows that West Berkshire's performance is slightly better than average.

5.142 The Task Group sought further information regarding involvement in the Parish Climate Forum. Around 16-17 parish councils regularly attend the Forum meetings, but engagement of local environmental groups is recognised as an issue. Members highlighted that parish councillors are often not involved in these environmental groups or do not have the mechanisms to disseminate information to them. It was suggested that Adoddle could be used to engage with these groups and the associated database could be used when organising climate events.

### Iese Review

5.143 The Task Group received a presentation on a recent review undertaken by the Iese consultancy. This looked at:

- Customer demand
- How staff are able to resolve demand within current systems
- Potential options to strengthen the customer and staff experience.

5.144 The study focussed on Customer Services and Digital Services, but also on demand in Council Tax and Planning as high volume areas.

5.145 Key findings from the study included:

- 38% of the workload is considered 'failure demand', i.e. avoidable demand that arises due to a service not being delivered as expected, or through customer confusion.
- Almost half of failure demand (47%) is due to customer communications (e.g. customers wanting to check a status of a case or balance). Even when customers have accounts or want to do something online there may be ICT issues (13% of failure demand).
- 'Process' is another major failure demand category (31%), much of this is due to contractor performance (e.g. for waste) and submission of information for Revenues and Benefits and/or between departments (e.g. a house move).
- Even though the majority of contact (62%) relates to 'value demand' (i.e. valid demand that adds value to the customer), there are still 'waste processes' hidden within this, for instance the Customer Services Team playing a switchboard role (16% of all demand)

- Other examples of waste processes include sending customers hardcopy forms (9% of all demand) and confirming general policy that should be available on the website (17%).
- With a fully functioning customer portal much of the effort in the 39% of confirming statuses and balances and creating or updating cases could be removed through more effective customer self-service, although such a portal would come at a significant cost.

5.146 A number of opportunities for improvement have been identified:

- Increased automation will increase capacity to devote more time to vulnerable customers and those unable to self-serve, providing help and generalist guidance and ensuring that people are given warm hand-overs to specialists.
- Addressing failure demand will give Customer Services Advisors (CSAs) time to undertake work such as setting-up payment plans and other business support services
- CSAs spend 48% of their time passing demand on to other parts of the Council or leaving the next action with the customer. More should be done to ensure demand is resolved at the initial point of contact
- Process reviews could be undertaken to identify further triage and other type activities that the Customer Service Team could manage on behalf of services
- Improvements to telephony arrangements would ensure calls are not dropped when transferred from Customer Services to back office functions
- Some demand could be avoided through clearer and easier to find web information, a more effective customer portal and an automated switchboard system.
- Some demand is likely driven by the Council's tendency to offer-up phone numbers as a first contact option and a number of forms not being built into the website
- Some customer facing systems e.g. those for setting up payments or direct debits can be difficult to use and experience frequent outages and could be improved
- Back office systems also have similar issues, which causes issues for the CS Team

5.147 The Task Group welcomed the report. Members noted that some people would still struggle to fill out a PDF form online due to a lack of IT skills. However, for these people, customer advisors would be able to fill out the form on behalf of the customer, which would save on postage costs and would be quicker for the customer.

## 6 Proposals

6.1 This section sets out the Task Group's findings. Some of the issues identified have already been raised with officers and have already been actioned, are in progress, or are programmed. Others remain outstanding and it is recommended that these should be referred to Executive for further consideration. An indicative prioritisation system has been used to highlight the actions that the Task Group considers to be most important.

### Part 1: Out of Hours Emergency Centre and Response

Ref	Proposal	Priority	Lead
1	In order to help the OOH Contact Centre to locate incidents reported by customers, they could consider using the 'What 3 Words' app to allow locations to be pin-pointed to a 3m x 3m square. This is already used by Royal Berkshire Fire and Rescue Service and is particularly useful in locating a problem that is not at a particular address point. This is considered to be a quick win.	Medium	JEPU
2	When a customer calls the main Council number out of hours, there should be options that the customer can select so the call is transferred to the relevant OOH Service. This would mean that customers would not have to note down the number and redial.	High	JEPU and Contact Centre
3	A pop-up banner should automatically be generated on the Council's website via a timed script when the offices are closed. This would help customers looking for information about the OOH Contact Centre.	High	JEPU and Digital Team
4	Information about how to report emergency incidents out of hours should be disseminated via town / parish council websites, newsletters and noticeboards. Other opportunities should also be investigated, such as information on existing signage in public locations. This is considered a quick win.	Low	JEPU and Comms Team
5	Consider how social media could be used to disseminate information about emergency incidents to the public, e.g. with a feed to the Council's home page. This would help to inform residents that the OOH Service is aware of an incident, and to communicate related messages about diversion routes, and when the incident has been resolved. It is recognised that there would be an additional cost for this service.	Medium	JEPU and Comms Team

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6	Consider formalising processes around Planning Enforcement arrangements (e.g. circulation of lists of officers who would be available over Bank Holiday weekends).	Medium	Development and Regulation
7	Take action to increase the number of Emergency Duty Officers to at least 10, and seek to maintain numbers at this level thereafter.	High (Complete)	JEPU
8	Consider giving the EDO number to Members, so they can get hold of the relevant person in the event of an emergency.	Medium	JEPU
9	Ensure there is provision for customer satisfaction surveys and mystery shopping exercises for the Emergency Out of Hours Contact Centre. This would help ensure that quality standards are maintained and the service meets customer expectations.	Medium	JEPU
10	Changes should be made to the Out of Hours Service Manual escalation process to ensure that customers receive a call-back from a senior officer in response to ongoing issues if they have not been resolved after a defined period of time.	High	JEPU
11	The option of having the Council's Contact Centre Manager managing the Emergency Out of Hours contract should be explored, since there are strong synergies between the two operations.	Medium	JEPU and Contact Centre

### Part 2: Office Hours Customer Contacts

#### Contact Centre and Phone System

Ref	Proposal	Priority	
12	Consider cross-training more contact centre advisors so they are able to deal with a wider range of customer queries.	Medium	Contact Centre
13	Replacement of the Council's phone system should be prioritised and the new system should include an automatic switchboard with IVR, to allow people to self-serve in terms of selecting the officers or services that they want to speak to.	Medium (Programmed)	ICT
14	The new phone system should allow callers to be alerted if an officer is not available to take the call and to be given the options to: leave a message, return to	High (Programmed)	ICT

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	the switchboard, or to speak to another officer (with appropriate 'hunt groups' set up).		
15	Callers to the Contact Centre who are placed on hold should be provided with information about their place in the queue, or anticipated wait time until their call is answered to allow them to make an informed decision as to whether to remain on hold or call back.	High (Programmed)	ICT
16	Mystery shopping and customer satisfaction surveys should be routinely undertaken to better understand how staff are performing, if scripts are being followed, and if the service is meeting customer expectations and standards set out in the new customer charter.	Medium	Contact Centre

### Website

Ref	Proposal	Priority	
17	Consider revising the layout of the website, so that navigation menus are available at all times (i.e. through use of a mega-menu), and to optimise displays on all devices, particularly mobile phones.	Medium	Digital Team
18	Consider how customer journeys via the Council's website can be optimised to shorten the number of interactions.	High	Digital Team
19	The Council should run workshops to see if the report a problem page can be made easier for customers to use.	Low	Digital Team and Environment
20	There should be further integration of third-party applications within the 'My Account' system to help eliminate the need for multiple logins. Ideally, all existing logins should be identified and programmed for inclusion where OpenID login functionality is supported.	Medium (In progress)	Digital Team
21	All new IT systems should be rigorously tested to ensure they are not released with bugs, with sign-off required by service leads.	High	ICT
22	Provide organisation charts on the Council's intranet to make it easier for Members to find the appropriate officer to handle their queries.	High (In progress)	Digital Team
23	Provide more Member training on how to use Council systems including ModernGov and discuss with Members how they can be better used.	High (Programmed)	ICT and Democratic Services

Provision for Disabled Customers

Ref	Proposal	Priority	
24	The need for BSL interpretation of Council meetings should be reviewed once further government guidance has been issued in 2023.	Medium	Democratic Services and BCT Team
25	Produce BSL videos about Council services and easy read versions of key documents to make them accessible to as wide a range of customers as possible.	Medium	Adult Social Care and All Services
26	Consider what further changes need to be made for engaging and supporting disabled customers once the current Equality Diversion and Inclusion work stream has been completed.	Medium	BCT Team

Customer Service Standards and Training

Ref	Proposal	Priority	
27	Review the remit of the Customer First Programme Board or its successor. Members felt that this should be more strategic and high profile, and should be driving customer service improvements across the Council, including digital transformation. This should have stronger reporting mechanisms than at present. Also, opportunities should be taken to make better use of relevant Members' expertise (e.g. through membership of Customer First Programme Board or its successor).	High	Executive Directors
28	Members noted the new Customer Service Charter that clearly sets out the standards that the Council will deliver. This should be clearly displayed on the website and in Council offices so that customers know the standards that they can expect to receive. Training should be provided to ensure that all staff are aware of the Charter and how to best meet the needs of the customer. Performance against targets should be measured on an ongoing basis and reported corporately.	High (Programmed)	Customer Engagement and Transformation and HR



Adult Social Care

Ref	Proposal	Priority	
29	Develop a comprehensive communications campaign to recruit and train more independent advocates in order to address the current shortfall and reduce delays for customers.	Medium	Adult Social Care and Comms Team
30	Investigate the business case for developing a High Street presence in central and eastern areas of the district to support ASC and other services.	Low	Adult Social Care

Development and Regulation

Ref	Proposal	Priority	
31	Review how the Planning Service can work with the Environment Delivery Team to offer a more integrated service for customers who are looking to improve the environmental performance of their development (e.g. through solar panels, heat pumps, or insulation).	High	Development and Regulation and Environment
32	Consider what additional guidance could be given to support applicants making simple applications.	Medium	Development and Regulation
33	Investigate the use of apps to facilitate developers to engage with local communities, and consider how these could be integrated with the Council's website to provide updates on major developments in the area.	Low	Development and Regulation and Digital Team
34	Improve the Council's website to make it easier for customers to undertake routine tasks, such as purchasing maps or paying for planning applications.	Medium	Development and Regulation and Digital Team
35	Provide additional information about 'important dates' on the Planning Portal (e.g. closing date for objections and the cut-off date for Member call-in).	Medium	Development and Regulation
36	Amend the format of orange site notices to make them easier to read and to incorporate QR codes that link to the relevant application within the Planning Portal. (This would be a quick win.)	Medium	Development and Regulation

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37	Regularly promote the service where residents can register to be notified of planning applications in their area, and consider using e-newsletter to tell people about planning issues and planning applications.	Medium	Development and Regulation and Digital Team and Comms Team
38	Consider the use of Planning Advisory Groups as a mechanism for engaging parish / town councils, local residents and other stakeholders on major developments.	Medium	Development and Regulation

### Environment

Ref	Proposal	Priority	
39	All elected Members should be encouraged to regularly promote the 'report a problem' tool through local newsletters and magazines.	High	Members and Comms Team
40	Consider revising the 'report a problem' page to incorporate icons and help buttons to reduce the number of clicks and to better guide customers through the reporting process.	High	Environment and Digital Team
41	Consider how communications can be improved including: providing proactive network management information (e.g. through the website, monthly newsletter, social media, etc); website content; mystery shopping; seeking customer feedback; achieving a more consistent approach to customer service across the department; and managing longer duration enquiries.	Medium	Environment and Comms Team
42	Consider how engagement with local environmental groups can be improved, including via the Parish Climate Forum.	Medium	Environment

## 7 Other options considered

OSMC may choose to accept the Task and Finish Group's recommendations in full or in part, or amend the recommendations before putting them to the Executive. Alternatively, OSMC may choose not to put any of the Task and Finish Group's recommendations to the Executive if it considers that they are not appropriate.

## 8 Conclusion

- 8.1 The proposals outlined in Section 6 above have been agreed by the Task Group, based on the evidence presented. It is considered that these would help to improve various aspects of the customer journey. While some of these could be actioned relatively quickly, at minimal cost and with existing resources, it is recognised that others would have financial and resource implications and it would be unlikely that they could all be progressed. It is recommended that these be referred to the Executive for consideration, taking account of the priorities identified by the Task Group.
- 8.2 Given the importance of the Customer Journey to the Council, the Task Group also recommends that the Overview and Scrutiny Management Commission should keep this under review. This could be achieved through a Sub-Committee, or regular reports.

### Lessons Learned

- 8.3 The Task Group has also taken this opportunity to reflect on the experience of conducting the review and to identify lessons learned that could be applied to future reviews.
- 8.4 The key lesson is that the scope of the review was too ambitious and wide-ranging. As a result, the timescale for the review had to be extended twice, which had implications for the delivery of other Task and Finish Group reviews that OSMC had programmed for the remainder of 2022/23.
- 8.5 It would have been helpful at the outset for the Task and Finish Group to have been made aware of existing parallel groups, such as the Customer First Programme Board, and relevant pieces of work such as the Place Review, since that may have helped to avoid duplication of effort and improve work programming. Knowledge of the work of the Customer First Programme Board would have helped the Task Group to have more tightly defined its focus and directed its attention. The Task Group could have contacted Executive Directors and Service Directors at the outset to understand what work streams were relevant to the review.
- 8.6 Best practice suggests that reviews by Task and Finish Groups should be completed within six meetings or less. However, where a review is found to be taking much longer than expected, it would be reasonable to have a break point (e.g. after 6 months) and report on the elements of the review undertaken to that point. This would provide an opportunity for the Task Group to take direction from OSMC.
- 8.7 It would have been easier to convene Task Group meetings if there had been 5 Members appointed to the Task Group, since this would have made it easier to achieve a quorum.
- 8.8 The Task Group would have liked to identify external parties with relevant expertise who could have been asked to give evidence on particular areas of interest to the Task Group.

## 9 Appendices

Appendix A – Customer Journey Task and Finish Group Terms of Reference

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Appendix B – Emergency Out of Hours Contact Centre Call Handling Statistics

Appendix C – Contact Centre Statistics

Appendix D – Member Survey Results

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**Background Papers:**

['Customer Journey – Out of Hours', Overview and Scrutiny Management Commission, 24 May 2022.](#)

['Customer Journey Task Group – Interim Report', Overview and Scrutiny Management Commission, 29 November 2022](#)

**Subject to Call-In:**

Yes:  No:

- The item is due to be referred to Council for final approval
- Delays in implementation could have serious financial implications for the Council
- Delays in implementation could compromise the Council's position
- Considered or reviewed by Overview and Scrutiny Management Committee or associated Task Groups within preceding six months
- Item is Urgent Key Decision
- Report is to note only

**Wards affected:** All wards

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