

Improvement and Efficiency Commission – 7 October 2009 Collaborative Efficiency Programme Update

General Update

Since the last meeting on 28th July 2009, the Programme Office has made progress with each of the 10 priority service areas, providing a timeline of activity attached in Appendix A.

In addition, the Programme Office has met with each of the Collaborative Service Group members including Partners on an individual basis to understand what the current position of each authority / Partner and ensure closer engagement in collaborative working, all of which were positively received.

A CSG Away Day meeting was held on 23rd September looking at progress to date, opportunities, challenges and individual and collective actions. In summary, there is an acceptance by the Collaborative Services Group (CSG) that there is a need to gain momentum and give considerable focus and pace in moving forward with all 10 areas and achieve a return on investment in both the shorter and longer term.

Service Area Update

Customer Contact and Social Transport

Both of these service areas were the first to be piloted for the Stage 1 activity to assess the current “As-Is” status which completed in April 2009 and produced a Delivery Options paper that identified 20 opportunities on both an individual and collaborative level. Overall, authorities signed up to on average, 80% of the opportunities relevant to their authority.

Since this time the main barrier has been obtaining financial information from individual authorities in relation to savings. Furthermore, collaborative savings is a new area of approach although work is expected to involve finance managers to identify these savings and take this forward. However, this has not prevented progress in so much as high level delivery plans have been produced and CSG members are signing off which individual priorities will be taken forward in their authorities, attached in Appendix B.

The Programme Office are holding workshops during October with the Service Managers to write the business plans for the collaborative opportunities which will then be presented to CSG for approval in November.

A strategic customer contact group has now been established to drive both the visionary work and pending future projects of this service area through to completion.

Additional grant funding received to resource a collaborative opportunity within Social Transport, “Shared Technology”, looking at a joint scheduling system with GMPTE.

Transactional Finance,

As an outcome of the work completed in the Customer Contact and Social Transport areas, a key lesson learned was to engage with service managers earlier in the process and obtain high level data that will inform and equally shorten the process for the “As-Is” Stage 1 work.

This service area has recently completed the Stage 0, high level data gathering exercise. This information will be used to hold workshops in October to identify potential opportunities before moving immediately onto Stage 1.

A report on the outcomes of the potential opportunities will be presented to CSG in November.

Transactional HR, IT Platform and Infrastructure, Collaborative Insurance and Workforce Development

The scope of the work to be undertaken in all of these areas has now been agreed by CSG;

Transactional HR – a sub group has been formed to progress this workstream, although there is a potential delay in achieving the completion deadline of December 2009 due to a request for additional funding at the next CSG meeting on 18th November.

IT Platform and Infrastructure – have commenced the Stage 0 data gathering exercise and expected to complete in November.

Collaborative Insurance – have commenced the Stage 0 data gathering exercise and expected to complete in November.

Workforce Development – preparations for Stage 0 work in progress with the Group, expected to be agreed at the next meeting in October.

Adults and Children’s Services

Both of these service areas are currently defining their scope and will report back to CSG once agreed.

Events to be held with both groups and the Programme Office to agree the scope.

VPMM

A delivery options paper to complete Stage 1 work has been produced and presented to the group for discussion.

The final report is to be submitted at the CSG meeting on 18th November.

Appendix A: Key Milestones 2009/10

A detailed project plan has been developed outlining the breakdown of specific tasks for delivering the programme until the end of this financial year. The table below highlights the key milestones within this project plan.

Priority Service Areas

| Service Area | Stage of the Delivery plan | Start Dates | Completion Dates | Status | Impact on delivery | Current Activity |
|------------------|------------------------------------|-------------------|--|--|---|--|
| Customer Contact | Stage 1 | January '09 | March '09 | Delivery Options papers presented to CSG 25 Mar '09 | | |
| | Action Plan for Delivering Stage 2 | July '09 | 18 September '09 for reporting to CSG 23 September '09 | High level Delivery Plan completed with exception of financial figures | Savings information required to produce business plan and sign off for Delivery stage | <p>Each CSG member identifying efficiency savings from individual opportunities and signing off priorities to be taken forward</p> <p>Nominations received from 6 authorities and 1 partner to form the Strategic Group Nominations received for Service Area Champion, CSG to approve.</p> <p>Workshop being held with Service Managers in October to support first draft of business plan for collaborative opportunities</p> <p>Meetings with Finance Managers to capture collaborative savings to be organised</p> |
| | Stage 2a– Initiate Programme | January '10 - tbc | March '10 - tbc | | | |
| | Stage 2b – Deliver Programme | April '10 - tbc | July '10 - tbc | | | |

| Service Area | Stage of the Delivery plan | Start Dates | Completion Dates | Status | Impact on delivery | Current Activity |
|------------------------------|------------------------------------|-------------------|--|---|---|--|
| Social Transport | Stage 1 | January '09 | March '09 | Delivery Options papers presented to CSG 25 Mar '09 | | |
| | Action Plan for Delivering Stage 2 | July '09 | 18 September '09 for reporting to CSG 23 September '09 | High Level Delivery Plan completed, with exception of financial figures | Savings information required to produce business plan and sign off for Delivery stage | <p>Each CSG member identifying efficiency savings from individual opportunities and signing off priorities to be taken forward</p> <p>Workshop being held with Service Managers and Partners in October to support first draft of business plan for collaborative opportunities</p> <p>Meetings with Finance Managers to capture collaborative savings to be organised</p> <p>Additional grant funding received for one opportunity "Shared Technology" working with GMPTE which will support dedicated resource to ensure its success in delivery</p> |
| | Stage 2a– Initiate Programme | January '10 - tbc | March '10 - tbc | | | |
| | Stage 2b – Deliver Programme | April '10 - tbc | July '10 - tbc | | | |
| Transactional Finance | Scope defined | April '09 | May '09 | Signed off by CSG 20 May '09 | | |
| | Stage 0 - pilot | June '09 | July '09 | Draft report presented to CSG Jul 09. Final report completed Sep | Report highlighting individual authority data to go through new | Amended report being sent out to CSG members for sign off |

| Service Area | Stage of the Delivery plan | Start Dates | Completion Dates | Status | Impact on delivery | Current Activity |
|------------------|----------------------------|---------------|------------------|--|---|---|
| | | | | 09. CSG requested report be separated out by authority. | sign off process as agreed at CSG away day. | |
| | Stage 1 | October '09 | January '10 | Workshops to identify initial opportunities (part of new stage zero) will now be held in October | Stage One will now commence in Nov | Workshops being organised through Transactional Finance Group |
| Transactional HR | Scope defined | June '09 | July '09 | Signed off by CSG 22 July '09 | | |
| | Stage 0-1 | September '09 | December'09 | Held meeting with Strategic HR Group Sep 09 | Potential delay in achieving completion of Stage 1 for December | Request for additional funding to be provided for next CSG meeting in November Follow up meeting with Strategic HR to be organised to confirm governance and links to other Groups i.e. Workforce Development and Transactional HR |
| IT | Scope defined | May '09 | July '09 | Signed off by CSG 22 July '09 | | |
| | Stage 0 | September '09 | October '09 | IT Group meeting held 23 Sep to agree process to gather data via SOCITM | Stage 0 data gathering exercise will impact on timescales for Stage 1 although potentially recoverable as data may be used for Stage 1 dependant upon content and quality | SOCITM data to be used for Stage Zero data gathering and potentially Stage 1 commencing 1 st October for approx 8 weeks. Identify data capture for authorities not using SOCITM data for Stage 0 completion Meeting arranged with SAC to discuss next steps and finalise Stage 0 documentation (Brief, Mandate & Stage 1 Delivery Plan). |

| Service Area | Stage of the Delivery plan | Start Dates | Completion Dates | Status | Impact on delivery | Current Activity |
|--------------------------------|----------------------------|--------------|---|--|--|--|
| | Stage 1 | December '09 | March '10 | | | |
| Collaborative Insurance | Scope defined | May '09 | July '09 | Signed off by CSG 22 July '09 | | |
| | Stage 0 | October '09 | November '09 | Draft Mandate produced. Currently being considered by group | | CIPFA data to be used for Stage Zero data gathering |
| | Stage 1 | November '09 | January '10 | | | |
| Workforce Development | Scope defined | May '09 | July '09 | Signed off by CSG 22 July '09 | | Group completing preparatory Stage 0 information e.g. high level risks and how to gather Stage 0 data Draft Brief and Mandate in progress by OD Sub Group. Actions and draft brief and mandate for OD Group will be presented in October for agreement and sign off |
| | Stage 0 | November '09 | December '09 | | | |
| | Stage 1 | February '10 | April '10 | | | |
| Children's Services | Scope defined | Jul '09 | October '09 | Held initial meeting Aug 09 need to follow up | Delay in scope sign off will impact delivery of Stage 0 timescales | Potential facilitated event with Directors across the Children's Services Group to define scope |
| | Stage 0 | December '09 | March '10 | | | |
| | Stage 1 | May '10 | September '10 | | | |
| Adult Social Care | Scope defined | | October '09 for reporting to CSG 18 November '09 | Held meetings to identify scope Jul & Sep 09. Need to follow up. | Delay in scope sign off will impact delivery of Stage 0 timescales | Potential facilitated event with Directors across the Adult Social Care Group to define scope |

| Service Area | Stage of the Delivery plan | Start Dates | Completion Dates | Status | Impact on delivery | Current Activity |
|--------------|-------------------------------|-----------------|---|--|--|---|
| | Stage 0 | November '09 | March '09 | | | |
| | Stage1 | May '10 | September'10 | | 0 | |
| VPMM | Stage 1 | June '09 | 31 August '09 – moved from 31 st July'09 | Draft Delivery Options Paper circulated for discussion with Group. | Initial dates for Options paper (July'09) will delay progress to Stage 2 | Paper to be discussed at CSG in November Group meeting on 29 th Sept to discuss first draft paper |
| | Stage 2a – Initiate Programme | September '09 | March '10 | | | |
| | Stage 2b – Deliver Programme | To be confirmed | To be confirmed | | | |

Key to Stages

- Stage 0 – Assess viability of the programme
- Stage 1 – Identify improvement opportunities
- Stage 2a – Initiate Programme
- Stage 2b – Deliver Programme

Appendix B

AUTHORITY OPPORTUNITY STATEMENT - SOCIAL TRANSPORT INDIVIDUAL OPPORTUNITIES

| | | Bolton | Bury | Manchester | Oldham | Rochdale | Salford | Stockport | Tameside | Trafford *** | Warrington | Wigan |
|----------------------|--|--------|--|------------|---|---|---------|-----------|----------|--|------------|---------|
| IQW 01 | No longer specify transport provision in section 6 of | | | | | | | | | | | |
| IQW 02 | Shift customer transport enquiry calls from transport | | | | | | | | | | | 0 |
| IQW 03 | Implement web forms for the capture of applications for travel assistance, invoices from suppliers and general transport enquiries | | This will be critically examined as to feasibility and savings opportunities - No savings identified. | | Currently being rolled out as part of the Integrated Transport Unit Project (ITU) - Minimal savings but will form part of the overall efficiencies attached to the ITU project of £400k | Savings: TIC* 1. Cost of IT and development time would have to be determined within AGMA. 2. Applications for travel assistance - web forms could be offered as an option but the majority of applications are obtained through a referral service. This would introduce a further tier in the process of obtaining social transport. There could also be problems with data protection. 3. Invoices from suppliers and general transport enquiries - 0.5 of a post deals with these issues. We deal with a lot of single transport suppliers who do not have access to the internet. This area could be dealt with as new contractors are brought in, but we would not anticipate significant savings. 4. Pro-formas would have to be introduced with relevant training. | | | 0 | The potential for this would be for ASC (individual budgets) using the ring & Ride interface with GMPTE, | | |
| IQW 04 | Design and rollout a model of travel solutions e.g. walking buses, walking with an escort, public transport training, using other local community transport providers etc. These solutions would be agreed with customers as part of the overall care assessment for both children and adults. This could include the collaboration and partnership with GMPTA, GMPTE, Local Authority taxi licensing, other community transport initiative etc. | | Bury is already successfully promoting 'walking buses' but not in the form or type of user being talked about in this proposal. These proposals may have to be part of a wider package of solutions. There may be opportunities to explore options on the margins but is not seen as a quick win. No savings identified. | | Independent Travel Trainers currently being recruited - Savings will form part of the overall efficiencies attached to the ITU project of £400k | Savings: TBC* 1. If this was to go ahead it would involve engaging additional Escorts to walk the children to school. Staffing levels for escorts could only be determined when the numbers of children have been agreed. This would alter on an annual basis. A high percentage are unable to walk anything more than a short distance and there would be significant issues surrounding Health and Safety. 2. Public Transport training - already exists for young people but is Grant Funded through LSC not via the base budget. This could not be expanded without significant investment but voluntary bodies are being looked at to provide this training. Local Community Transport is already being utilised via New Deal and Ring & Ride. Cannot cost up this proposal without knowing which of the various options will be adopted by RMBC and what impact introduction of the options would have of journey numbers/journey times. | | | 450K* | Already being implemented as part of Trafford's Transport Strategy Independent travel (e.g. public transport) will only eliminate a TTP run if all the children attending a school from an area transfer to public transport. Otherwise the TTP run still operates but for a smaller group and costs about 80% of a larger run (this increases the overhead rate for the remaining users). | | 150,000 |
| IQW 05 | Train Care Assistants as Escorts and Drivers and vice versa so that these resources can be fully involved in daily activities of Day Care Centres | | | | | Savings: TBC* If care assistants were to be trained as drivers this would cost £1000 per person for the PSV Licence required to drive a passenger vehicle. This suggestion might work in a limited way but it would be quite specific. Care assistant contracts would have to be altered to extend their working day or pay enhanced rates of pay. Care assistants are currently paid more than escorts. There would be an advantage in that care assistants would already know the needs of the client. Cannot cost up the proposal without an indication of the number of staff that would be involved. | | | | | | |
| IQW 06 | Create an operational framework for greater communication and transparency between those teams assessing eligibility for transport and service providers | | | | Underway as part of the work of the ITU - Difficult to quantify but will form part of the overall savings of £400k | | | | 100* | | | 15,000 |
| ISO 01 | Integrate the provision of children's and adult's transport | | Bury is currently critically considering a new, more integrated, business model going forward - No savings identified | | ITU Project - £400k savings across the various areas within scope. | | | | 25 | | | 350,000 |
| ISO 02 | Investigate feasibility of devolving funds to further education organisations, special needs schools, or appropriate collectives of schools (where transport costs are relatively high) for transport provision. Funds would be ring fenced to transport provision only, and performance monitored. | | This work is likely to be undertaken if and when an integrated Transport provision is established. | | | | | | | | | 80,000 |
| ISO 03a | Use e-Procurement to purchase travel solutions from third parties | | This is achievable longer term and could be an opportunity for the Third sector to get involved to build supplier side capacity and promote competition - No savings identified | | To be considered as part of the longer term efficiencies - E-procurement is included in the procurement strategy. Difficult to quantify but will form part of savings in future years. | Savings: TBC* Expansion of e-procurement to transport has already been considered by the e-procurement team at Rochdale but rejected, at least in the short term. This should be cost neutral as the e-procurement system is already in place but has not been expanded to Transport Services due to the complexities that can arise with certain travel arrangements. Home to School transport does not easily lend itself to e-procurement because there has to be flexibility in raising orders. There is a definite need to maintain the quality in the service which needs to be built into the process. | | | | Already being implemented in Trafford | | 36,000 |
| ISO 03b | Use of e-Auctions | | This exercise would form part of the package of integration - No savings identified. | | To be considered as part of the longer term efficiencies - E-auctions are included in the procurement strategy. Difficult to quantify given range of outcomes over different authorities. | Savings: TBC* This is being investigated further as an option with re-tendering due prior to September 2010 | | | 50* | Already being implemented in Trafford | | 0 |
| Total savings | | 0 | 0 | 0 | 0 | 0 | 0 | 250,000 | 25 | 0 | 0 | 631,000 |

- Key**
- Opportunity being taken forward by Authority
 - Opportunity does not apply to the Authority
 - Authority decision not to take the opportunity
 - * Rochdale are currently chasing update information on their individual opportunities
 - ** These savings have already been achieved
 - *** £2.6m net efficiency savings have already been achieved in Trafford over the three years to Dec

| | |
|----------------------------------|----------------|
| Overall AGMA wide savings | 881,025 |
|----------------------------------|----------------|

AUTHORITY OPPORTUNITY STATEMENT - SOCIAL TRANSPORT - COLLABORATIVE

| | | Bolton | Bury | Manchester | Oldham | Rochdale | Salford | Stockport | Tameside | Trafford | Warrington | Wigan |
|---------------|--|--------|------|------------|--------|----------|---------|-----------|----------|----------|------------|-------|
| CQW 01 | Create user groups led by AGMA Programme Office which would cover areas such as: Policy, Training, Routing systems, Operational issues, Data capture | | | | | | | | | | | |
| CQW 02 | Shared technology and associated knowledge | | | | | | | | | | | |
| CSO 01 | Develop a common financial and performance management process for application across AGMA | | | | | | | | | | | |
| CSO 02 | Design and implement a consistent transport policy and assessment process across AGMA This policy would include eligibility criteria, an application and assessment process with an annual review cycle and appeals processes. The policy would include co-location / devolved commissioner, SLAs, performance management, budget setting and management processes, reporting requirements, travel solution options and guidance on concessionary travel etc. | | | | | | | | | | | |
| CSO 03 | Pool resources (e.g. spare vehicles), centralise activities, share operational infrastructure e.g. maintenance facilities etc. within AGMA. Alternatively no longer have any spare fleet vehicles and contract an external company to provide on an ad hoc emergency basis. | | | | | | | | | | | |
| CSO 04 | Centralise training function across AGMA Link with Learning and Skills Council complement provision Create a Training Academy covering: Driver training; training for Escorts; transport administration; scheduling systems; finance; performance measures and path towards achieving and NVQ qualification. The Training Academy could source external trainers as well as using existing local training skills to meet demand across the region. | | | | | | | | | | | |
| CSO 05 | Implement a common vehicle tracking system across AGMA | | | | | | | | | | | |
| CSO 06 | Centralise the procurement function across AGMA | | | | | | | | | | | |
| CSO 07 | Build route scheduling knowledge to support the sharing of vehicles for cross boundary or out of region service delivery. | | | | | | | | | | | |
| LTV 01 | Outsource service delivery to a single AGMA wide private sector transport provider | | | | | | | | | | | |
| LTV 02 | Create a single AGMA wide commissioning function to incorporate: Social transport policy; Setting of eligibility criteria; travel application assessment and processing and service procurement | | | | | | | | | | | |

Key

| | |
|--|---|
| | Opportunity being taken forward by Authority |
| | Opportunity does not apply to the Authority |
| | Authority decision not to take the opportunity forwards |

Collaborative Efficiency Savings

A workshop is currently being arranged to identify the efficiency savings that can be gained through the implementation of the collaborative opportunities. Financial representatives from authorities' will be involved in this work.

Barriers to delivery – Social Transport

- Current difficulties in identifying efficiency savings, makes identification of priorities and work planning difficult.
- Resources to deliver both individual and collaborative opportunities need to be identified. Capacity within authorities is limited and resources are being used to deliver in-house efficiency programmes.
- Potential implications of the personalisation agenda are currently unknown. Authorities are reluctant to invest resources in delivering opportunities which may no longer be relevant once the personalisation agenda has been implemented in their authorities.
- Current levels of maturity differ across authorities', therefore ability to buy-in to collaborative opportunities also differs. This barrier can be overcome by having staged approaches to implementation where authorities can buy-in to new developments at different stages depending on their state of readiness.
- Current policy differences across authorities may reduce levels of buy-in. Prioritising the opportunity to develop a consistent policy across AGMA may help overcome this barrier.
- Incompatibilities in systems currently in use across authorities, limits the sharing of technology and knowledge.
- Differences in procurement practices and relative position in relation to the procurement cycle may hamper joint purchasing and resource pooling. However working with the Procurement Hub to establish framework agreements and a move to more consistent specifications should overcome this.

AUTHORITY OPPORTUNITY STATEMENT - CUSTOMER CONTACT - INDIVIDUAL

| | | Bolton | Bury | Manchester | Oldham | Rochdale | Salford | Stockport | Tameside | Trafford | Warrington | Wigan |
|---------------|---|--------|------|--|--|---|---------|---|--|--|------------|--|
| IQW 01 | Create standard recruitment assessments for individuals and centralise volume recruitment of staff whilst increasing the number of methods used | | ETBC | ETBC | SAVINGS: ETBC Difficult to quantify whether any savings would need further discussion with our partner. | | ETBC | SAVINGS: £100,000 Stockport is undertaking a review of Customer Contact as part of a Scrutiny review with member involvement which is taking the opportunities identified in the delivery options report into account. | We are not taking this opportunity forward as we have low attrition rates in what is a small contact centre (12 seats). Currently a robust enough process is in place consisting of a telephone and IT test followed by an interview. The spend is far less than the estimated £17k savings suggested as we only recruit on average of 1 operator per annum. | ENon Cashable Trafford has already started on the process of centralising recruitment. Due to low attrition rates (<10%) recruitment is not a major issue for the Council and savings are expected to be negligible | ETBC | SAVINGS: £17,680 |
| IQW 02 | Introduce a customer service specific Business Continuity Plan | | | Opportunity being taken forward by Authority as Unity are developing their own plans | Does not apply. Business continuity plans in place, also taking part in the NWECC project | | ETBC | The review is in part seeking to identify and eliminate failure demand and unavoidable contact, thereby creating opportunities to reduce costs in the Contact Centre. There is also a focus on exploring opportunities to improve service provision through developing the on line 'offer' including transactional web forms This should also result in opportunities for savings across both telephone calls and face to face customer channels. It is anticipated that these activities will result in a minimum of £100k p.a. savings of contact centre direct costs (5%) and depending on the up-take of web enabled contact the savings will increase. Stockport is again interested in exploring those collaborative opportunities which would result in further savings. | SAVINGS: ETBC We are currently in the process of setting up Business Continuity at 2 other locations within Tameside in the event of the Contact Centre being unavailable. There will be a capital cost implication of £74,500 for 1 of the sites and revenue of £14k per annum. The basis of any cost avoidance appears to be on the assumption that calls are currently outsourced as the business continuity - this is not the case for Tameside. We currently do not have business continuity in place and therefore any action will be an additional cost rather than a saving. | ENon Cashable Revision being worked on currently. Stage one completed for customer services. Local solution for BC in Trafford involves using Stretford Library, equipment would need to be relocated in the event of a disaster. Although Trafford are interested in considering options around shared BC, any costs savings are not possible to identify at this moment | | SAVINGS: £185,232 Based on "what if" scenario and also cost of outsourced BCM provision which we don't use. We will continue to link with AGMA project on this for any potential savings, and have also worked regionally with NWECC on development of BCM toolkit. |
| IQW 03 | Integrate CTI (Computer Telephony integration) | ETBC | | ETBC | SAVINGS: ETBC Difficult to quantify whether any savings would need further discussion with our partner. | TOTAL SAVINGS 2009 - 2012 : 40k Above calculation based on AGMA programme office assumption re 10 sec time saved per call. Number of calls which CTI would apply to also estimated at 75%. Further work would need to be completed to see if the 10 sec estimate of time saved could be realised in practice. Further work would also need to be completed to test assumptions about % calls which would reduce as a result of CTI. Any shift from the estimate would result in changes to predicted cashable savings. The first meeting has taken place and there will be another meeting in 2-3 weeks. Work is being undertaken to check out the 10% assumption (other Local Authorities' experience) and also costings for technology. It also depends on the ability of the telephony system to support technology. | ETBC | ETBC | SAVINGS: £10,990 We are unable to accurately calculate savings for implementing CTI. Whilst we do envisage some efficiency savings will be gained over time, this very much depends on having a well populated, up to date CRM system. Currently we do not have that in place and it will take time and resources to get to this stage before we can realise any savings. The cost to implement CTI is across services ie ICT and Call Centre and we also have an external supplier in the equation. Distilling accurate set up costs to off-set against future savings is difficult. We have estimated savings that might be achieved but there are caveats to this calculation as follows: 1) The calculation we have used is based on the rationale used by MIP ie a saving of 10 seconds per call. We have no basis to test this as we currently do not have CTI and the time saving may prove to be inaccurate. 2) The calculation is based on the cost per call at Tameside in 2008/9 which was £1.63 per call and an average call length of 2.5 minutes. 3) CRM may not be implemented and if this is the case CTI cannot be implemented either. If | ENon Cashable CTI in a call centre environment can improve the speed which calls are processed as information is provided to the agent about the next caller before answering e.g. a council tax bill or a name and address for a personal greeting. The use of CTI was recently proposed as a project within the Council under the Customer Services work stream however an evaluation by the ICT Governance Board gave priority to the further roll out of CRM and upgrading CRM to allow increased user self service as a priority. Investment in CTI could be reviewed at a later date. Benefits of CTI would include prepopulation of call centre agent screens, based on the call volumes it is not considered to deliver savings. | | SAVINGS: £230,102 call handling reduced by 10 seconds - doesn't incorporate any cost to achieve integration |
| IQW 04 | Introduce 0845 numbers for high volume lines coming into Contact Centre operations as part of a corporate numbering strategy | | | | We have already got 0845 numbers | | ETBC | | We are not taking this opportunity forward as we do not agree with making income from customer calls. The Cabinet Office steer is to use 0300 numbers for public services which is non profit generating. | | | SAVINGS: £13,092 Based on income from charging customers to call us |
| IQW 06 | Implement web-forms and functions for high-volume services. Develop interactive web forms enabling customer to directly submit required information. This opportunity should also be viewed with strategic development in mind. | ETBC | ETBC | ETBC | SAVINGS: ETBC Difficult to quantify whether any savings would need further discussion with our partner. Will be pursuing this option as a part of the Internet development proposed in the Customer Services Strategy | TOTAL SAVINGS 2009 - 2012 : TBC There is an overlap between this opportunity and opportunity ISO11. Additional web work, over and above those detailed in ISO11 would be required - costs of integration tools would be in the region of £70k with £10k revenue costs. Costs of integration may vary considerably but rough estimates are around £15K -£20K per integration. Shift in channels and resultant savings are already taken into account in ISO11. Joint meeting being set up with web and Transformation teams to take project forward. | ETBC | ETBC | We are not taking this opportunity forward. We have a high number of forms already in place for all services. Forms are interactive and customers can request services on-line. Our latest success in this area, for which we have been national recognised, is migrating Free School Meals applications from face to face to contact centre and on-line. | £200,000 Part of current Contact Centre Review and Transformation Programme as well as ongoing programme of scheduled work. Savings are expected due to an increase in self service. Savings of £100k/£200k could reasonably be expected across the Council as part of a wider approach to increasing customer self service. | ETBC | SAVINGS: £179,133 Based on 5% call reduction through channel shift - need to identify within plan if/when this could be achieved by |
| ISO 10 | A consistent telephone numbering strategy needs to be developed for each local authority Consolidation of customer contact numbers, use IP technology and IVR lines would benefit the operations | ETBC | ETBC | ETBC | SAVINGS: ETBC Difficult to quantify whether any savings would need further discussion with our partner. | TOTAL SAVINGS 2009 - 2012 : £0.00 Already feedback at workshop that Rochdale will not be pursuing this option. Already have 0845 numbering strategy in place. Our 0845 numbers do not generate income as we do not think it is appropriate to profit from customers calls. Going to investigate the potential for taking forward voice activated lines. The first project meeting has been held. Further work being undertaken to identify costs/potential savings – 2-3 weeks. | | ETBC | This opportunity has been identified as not being applicable to Tameside as we already use IVR and have a strategy that allows for 10 golden numbers which we are working towards. | £23,000 Trafford Council already operates a consistent telephone numbering strategy with a selection of readily identifiable numbers being chosen for primary services under the one stop shop (Access Trafford). IP technologies have been used for over 7 years and considerable savings have been made to date. Trafford is currently prioritising the use of IVR (Interactive Voice Response) as an effective way to transfer telephone calls to self service. Cashable savings based on site visits suggests savings of 1FTE. £23k savings assumed. | ETBC | SAVINGS: £58,188 Calc based on reduced line rental - wouldn't happen as lines would still be needed, just not publicly advertised. Reduction in cost of advertising - £15k for leaflet, need to check our costs for A-Z but already being removed. Proposed saving of £40k through use of IVR - no mention of cost to implement or robust evidence of calculation |

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|----------------------|--|------|--|------|---|---|------|------|---|---|------|---|---|
| ISO 11 | Web development work. Integrate services into CRM with a 'my account' option, increase the number of web forms, online payments available. | ETBC | £0 This work is ongoing in Bury and is part of a channel shift policy - No savings identified | ETBC | SAVINGS: ETBC Difficult to quantify whether any savings would need further discussion with our partner re CRM development . | TOTAL SAVINGS 2009 - 2012 : -£583,019 (costs £50k + £991k: savings 2011/12 of £457,981) The above figures are based on a number of assumptions and rough estimates. A considerable amount of further work needs to be done to provide more reliable figures and identify whether these estimated savings are achievable and cashable. Costs detailed above are made up of £50k for work to the website & £991K for implementation of a client index. Jason White leading project in client index – Joint meeting with transformation team and web team being set up to take forward. | ETBC | ETBC | SAVINGS: ETBC We are unable to accurately calculate any savings for this opportunity as all our transactions are currently on-line and citizens can already access services this way. The opportunity bases savings on channel migration and whilst having a citizen portal will enable us to push information to customers tailored to their needs rather than them having to search for it, it won't necessarily generate any savings as this customer base are likely to be already interacting with us via the website. Channel migration may take place in the future when the issue of electronic signatures on benefit forms is resolved but then only if this customer base has access to the internet. | | ETBC | SAVINGS: £179,133 Repetition of IQW06 - query if would achieve a further 5% shift through this. | |
| ISO 12 | Introduce measurement tools, schemes and incentives for improved performance management. Utilise workforce management appraisals, 360 degree feedback, personal development plans and other training opportunities to develop staff effectively. | ETBC | ETBC | ETBC | Opportunity being taken forward by Authority as Unity Partnership already operates its own performance management system | TOTAL SAVINGS 2009 - 2012 : £0.00 NB Contact Centre already has measurement tools & schemes in place for performance management. Appraisals, feedback and PDRs also in place. Rochdale keen to share in & develop best practice but don't believe that this will deliver any cashable savings due to attrition and sickness levels. Attrition rates low (contact centre attrition 2.5% average over last 2 years, contact centre sickness absence 5.5 days per fte average last 2 years). Unable to quantify costs until given detail about what new schemes will involve. Project meeting held – agreed with Nigel Muirhead and Wendy Swindell – no savings to be made. | ETBC | ETBC | SAVINGS: ETBC The rationale for savings for this opportunity are based on the assumption that by introducing measurement tools, schemes and incentives - 360 degree appraisals, personal development plans and training opportunities will reduce sickness absence levels and therefore create savings. We already have in place annual appraisals, regular one-to-one supervisions with staff, training and development plans and access to ICS awards. Where sickness is high in the call centre this has been due to long term conditions which are unlikely to be reduced by the implementation of the above. There might be impact in short term sickness, but taking into account we already have many things in place, quantifying the savings with any degree of accuracy in a small 12 seat contact centre is impossible and probably negligible. | £Non Cashable Needs to fit with Council's new Personal Development Review process. Not possible to quantify savings. | ETBC | SAVINGS: £48,028 Based on reduced absence rates - not currently an issue for us and no evidence to support that these measures would create saving | |
| ISO 13 | Introduce homeworking into Contact Centre operations, providing staff with access to telephony and ICT networks from home. This will provide more flexibility in the service offered to customers. | ETBC | £0 The Council is currentling reviewing its 'Homeworking' policy which is being progressed in all service areas where the technology and service functionality allows - No savings identified | ETBC | SAVINGS: ETBC Difficult to quantify whether any savings would need further discussion with our partner. | We already have 24/7 set up in the Contact Centre so no benefit to homeworking. | | ETBC | Savings have been estimated at £37,500 in the reduction of premises costs based on 25 agents at £1,500 per agent. We do not have 25 agents, we only have 12 seats so the saving amount is over estimated. It is unlikely that all agents would have a suitable environment in which to work at home and therefore premises would still need to be retained. As we only have a small contact centre of 12 seats we could not reduce the premises at this time and therefore no current savings are envisaged. However, if the contact centre expands in the future this opportunity may reduce expenditure to expand the contact centre. | ETBC Part of current Agile Working stream of the Council's Transformation Programme (LTA). Access Trafford also looking at concept of Virtual Officer. Not possible to identify savings at the moment. | ETBC | SAVINGS: £37,500 Based on 25 agents working at home and reduced premises cost - does not take into account cost of providing IT support and equipment and ongoing line rentals etc - this needs to be identified | |
| ISO 14 | Introduce a PayPoint facility for all Authorities, allowing local payments of bills be customers at a range of retail outlets including newsagents, convenience stores, supermarkets and garages. Customers are given a card which they use to make Council related payments such as Council Tax. Alternatively bills are printed with bar codes which can be scanned by the outlet, removing the requirement for a card. Payment is then made and accredited against the bill once the council has received payment. Most of these payments are made by cash. | | | | | We are not taking part in this as we already have it. | | | This opportunity has been identified as being not applicable to Tameside as we have already implemented PayPoint and payment at Post Offices and have closed all our cash offices. | £0 (a) Trafford has already introduced payzone/post office payments. (b) Customers can already request cards to allow them to make payments at any post office or any of the 30,000 payzone outlets. (c) Bar codes are already printed on invoices where the debt is due in one full payment (ie on Accounts Receivable bills) and we are shortly introducing bar codes for Benefit Overpayment invoices. We do not intend to use bar coding for council tax bills where at least 10 payments are made each year as cards are far more robust and last for several years. However, bar codes will be put on final notices where one full payment is required. (d) Payments are appropriated against bills by an automated interface. Savings nil | | | Already implemented |
| ISO 15 | Co-locate face-to-face centres with partners such as DWP, Job Centre, PCT and Police Service | ETBC | ETBC Her Majesties Revenue & Customs (HMRC) have relocated to Bury TH - Additional Income generated. | ETBC | SAVINGS: ETBC Difficult to quantify whether any savings would need further discussion to examine opportunities. Will be pursuing this option as a part of the development of local access points as proposed in the Customer Services Strategy | TOTAL SAVINGS 2009 - 2012 : -£225,000 (net cost 2009/10 £45K, net cost 2010/11 £90K and net cost 011/12 £90K) Rochdale MBC is already in the process of developing 3 joint Service Centres and a new council headquarters building which will also include a 4th Joint Service Centre. The first of these Joint Service centres is due to open in October 2009. The additional costs of providing this first centre are detailed above. No staffing savings have been made because this is about providing better services and facilities for customers across extended opening hours. It is not simply pulling together like for like. | | ETBC | This opportunity needs colour coding purple for Tameside as this opportunity was not identified as one we could benefit from. We are already co-located with libraries and have HMRC in one centre, police in another, DWP in 2 others | ETBC Council is reviewing options of shared accommodation with Trafford PCT. Savings unknown (assume nil for now) | ETBC | SAVINGS: £10,000 Based on reduced premises costs - we need to take into account the increased cost of spoke provision | |
| ISO 16 | Target areas of failure demand and avoidable contact in order to reduce failure demand and overall call volume by 5% | ETBC | ETBC Targets have been set along with the establishment of a cross department monitoring group reporting to Management Board. | ETBC | SAVINGS: ETBC Difficult to quantify the level of savings. Currently developing in house tool for the monitoring of avoidable contact (NI14). No current idea of the costs of this. | TOTAL SAVINGS 2009 - 2012 : £115,800 Unable to identify costs involved in reducing failure demand as service improvement costs will be dependent upon the improvements required for each type of avoidable contact. Further work is required to identify what these solutions would involve. NI14 project group already in place & taking this forward. Complex piece of work which will require a number of projects with services. | ETBC | ETBC | SAVINGS: £3,582 Savings for this opportunity have been calculated for each authority on the basis of a 5% call reduction. Tameside have actively taken steps to reduce avoidable contact over many years. Some of the more recent initiatives are Tell Us Once, Free School Meals etc and therefore our avoidable contact reported in April 2009 was low at only 15%. Whilst there are savings to be made by reducing contact these are likely to be much smaller than 5% for Tameside. It is envisaged that 1% reduction is more realistic and the savings have therefore been calculated on that basis. | ETBC Exercise currently underway to understand reasons for failure demand. Savings not confirmed | ETBC | SAVINGS: £185,232 Based on 5% reduction in calls | |
| ISO 17 | Implement an in-house CRM system, developed and maintained by internal ICT departments across AGMA, working closely with customer service departments to understand business requirements | | | | | We are not taking this forward as RMBC already has Lagon, an external system, in place. | | | This opportunity has been identified as not being applicable to Tameside as we have already commenced development of our own in-house CRM system. | | | | SAVINGS: £117,130 Not feasible - Northgate purchased |
| Total savings | | £0 | £0 | £0 | £0 | £798,781 | £0 | £0 | £14,572 | £223,000 | £0 | £927,436 | |

Key
 Opportunity being taken forward by Authority
 Opportunity does not apply to the Authority
 Authority decision not to take the opportunity forwards

Overall AGMA wide savings 1,963,789

AUTHORITY OPPORTUNITY STATEMENT - CUSTOMER CONTACT - COLLABORATIVE

| | | Bolton | Bury | Manchester | Oldham | Rochdale | Salford | Stockport | Tameside | Trafford | Warrington | Wigan |
|---------------|---|--------|------|------------|--------|----------|---------|-----------|----------|----------|------------|-------|
| CQW 05 | Introduce both industry standard and AGMA wide Service Level Agreements and Key Performance Indicators within the Contact Centre and other customer contact Points Examples are 80/20; call duration; first call resolution; cost to serve measures These to be based on Private Sector research, experience and good practice | | | | | | | | | | | |
| CQW 07 | Joint Business Continuity Planning; share sites across the region in the event that contingency plans are required for any local authorities. The collaboration would include the use of physical, technological and human resources | | | | | | | | | | | |
| CQW 08 | From a collaborative approach to addressing upgrades and resolving issues associates with Northgate CRM | | | | | | | | | | | |
| CQW 09 | Collaborate in the delivery of out-of-hours services across local authorities | | | | | | | | | | | |
| CSO 18 | Effective and comprehensive customer profiling capability should be developed with capacity to identify customer segmentation within the customer base. Tools such as the ESD toolkit, predictive data such as Experian's MOSAIC data and an existing in house system developed by an AGMA local authorities could all be utilised in order to provide a comprehensive profiling solution Using in-house technology for profiling would: reduce operational support and development costs; enable the development of a profiling system specific to the needs of AGMA local authorities with a public sector bias | | | | | | | | | | | |
| CSO 19 | Create a Training Academy and link with each local authority's local college to support with grant funding and create a multi-purpose training environment | | | | | | | | | | | |
| LTV 01 | Implementation of a virtual collaborative Contact Centre | | | | | | | | | | | |

Key

| | |
|--|---|
| | Opportunity being taken forward by Authority |
| | Opportunity does not apply to the Authority |
| | Authority decision not to take the opportunity forwards |

Collaborative Efficiency Savings

A workshop is currently being arranged to identify the efficiency savings that can be gained through the implementation of the collaborative opportunities. Financial representatives from authorities' will be involved in this work.

Barriers to delivering opportunities – Customer Contact

The barriers outlines below have been consistent issues raised at various stages in the Customer Contact project,

- Current difficulties in identifying efficiency savings, makes identification of priorities and work planning difficult.
- Resources to deliver both individual and collaborative opportunities need to be identified. Capacity within authorities is limited and resources are being used to deliver in-house efficiency programmes.
- Current levels of maturity differ across authorities'; therefore ability to buy-in to collaborative opportunities also differs. This barrier can be overcome by having staged approaches to implementation where authorities can buy-in to new developments at different stages depending on their state of readiness.
- Implementation may be reliant on other existing pieces of work within authorities such as their own improvement programmes and Value for Money activities.
- Incompatibilities in systems currently in use across authorities, limits the sharing of technology and knowledge, for example out of hours services.
- Differences in procurement practices and relative position in relation to the procurement cycle may hamper joint purchasing and resource pooling. However working with the Procurement Hub to establish framework agreements and a move to more consistent specifications should overcome this.
- Existing partnership agreements may prevent authorities implementing at the same time.
- There is a perception that politics, particularly Member buy in is a barrier to implementing the opportunities. There needs to be strong communication that Members and CSG want the opportunities implemented, to dispel this smokescreen.
- Some of the savings can not be identified as they sit with other enabler work streams such as Workforce Development and ICT