



South Hams  
District Council

# Access to Services Strategy

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## **1. The Need for an Access to Services Strategy – setting the context**

### **1.1 The Local Context**

The South Hams covers a large and predominantly rural geographic area of some 887km<sup>2</sup>. The population is currently 81,849 with only a third residing in the main market towns of Dartmouth, Ivybridge, Kingsbridge and Totnes. The district is flanked by the urban centres of Plymouth to the west and Torbay to the east.

According to nationally produced indices of deprivation, 22 of the 30 Council's wards are in the bottom quartile nationally in terms of access to services.<sup>1</sup>

In July 2002, the Council adopted a new aim and corporate priorities for the period 2002 – 2008. Corporate Priority 5 is to,

**“work with others to improve access to key services”**

Adoption of this priority was informed by wide-ranging consultation undertaken as part of the development of the South Hams Community Strategy 2003 – 2006. One of the priority themes of the Community Strategy is “Accessible Services, Supporting Safe and Caring Communities”.

Following the Council's Comprehensive Performance Assessment in June 2003, inspectors commented on under-performance in priority areas, including accessibility<sup>2</sup>.

In this context, there is a clear requirement to improve the means by which customers can access our services.

### **1.2 The National Context**

Central government has set a target for all councils to improve the way in which services are made available to customers and the wider community. By 2005, all services which are capable of being delivered electronically, should be available in this way<sup>3</sup>.

Delivery of services electronically is not just about use of the internet, although this is clearly a component of it. It is also about enhancing the way services are delivered through traditional channels (i.e. telephone, face to face and post) using information technology.

The objective is to provide a number of channels through which the customer can choose to access information or services and receive a consistently high level of service whichever option is chosen. This can either be through:

- Self Service – e.g. through the web site, interactive digital tv

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<sup>1</sup> Indices of Multiple Deprivation 2000

<sup>2</sup> CPA Final Inspectors Report, October 2003

<sup>3</sup> [www.localgov.gov.uk](http://www.localgov.gov.uk) – The national strategy for local e-government

- Remote access – e.g. telephone, e-mail, fax, letter, local community access points, text messaging
- Face to face contact with a member of staff – either at the Council’s offices or the customer’s home (where necessary)

The Government’s intention is that, for the customer, services will become “more accessible, more convenient, more responsive and more cost effective”<sup>4</sup>.

### **1.3 Other Drivers for Change**

#### **Customer Needs and Expectations**

It is becoming increasingly clear that, as far as accessing services is concerned, customers are no longer willing to accept being disadvantaged by virtue of their own personal circumstances. They should be able to interact with public authorities in a way that is most appropriate to their individual requirements, location and lifestyle. Consequently, there is an increasing expectation that services in both the public and private sectors are more responsive to customers’ needs, be that through the availability of new access channels, longer opening hours, more locations or joined up provision.

#### **Cost – effectiveness**

The principal motive for improving access to services is clearly about being more responsive to customer needs. However, in doing so, a potential benefit is the opportunity to make savings in costs and / or time by using new technology to do things more efficiently. The technology which will enable this, such as document image processing and workflow, are explained in greater details at 5.3.

## **2. Accessing Services: the current position**

The Council’s main office is based at Follaton House, Totnes. Opening times (for both telephone enquiries and visitors) are Monday to Thursday, 8.30am – 5.00pm and Friday, 8.30am – 4.30pm. There are also depots based in Ivybridge, Kingsbridge and Totnes, but these are not normally visited by members of the public (although they are used for collection points, such as for compost bins). The Harbour Office at Salcombe deals exclusively with issues relating to the harbour.

Outreach services are provided. For example, the Planning Service provides regular surgeries in Ivybridge, Dartmouth and Kingsbridge for a day every fortnight. The Housing and Benefits services also offer home visits where required.

The Council also maintains a website ([www.southhams.gov.uk](http://www.southhams.gov.uk)) which hosts a range of service related information and the opportunity to download a number of application and service request forms. A link is provided to the visitor oriented [www.somewhere-special.co.uk](http://www.somewhere-special.co.uk) which provides a range of tourist related information.

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<sup>4</sup> [www.localgov.gov.uk](http://www.localgov.gov.uk) – The national strategy for local e-government

The current structure of service provision is largely clustered around professional disciplines. Consequently, all enquiries relating to a particular service, regardless of the channel used, are handled by that service. A team of receptionists provide a signposting service for visitors and incoming telephone calls. Direct dial telephone numbers relating to specific service areas are also advertised in local directories alongside the main reception telephone number.

Whilst the experience of the customer in contacting these services can be good, there are a number of variables which can impact on the quality of the service received. These include:

- Visits to the offices favouring those who live closer to Follaton House and with the means of transport to travel here;
- A reliance to some extent on the customer knowing which particular service he / she needs to contact. If they do not, they will be passed between services;
- Customers with multiple enquiries being passed from service to service;
- Inconsistencies between services. This might include the existence of different customer service standards, different approaches to use of voicemail, variation in call answering performance, the ability to deal with staff absence (particularly for smaller services) and some services offering outreach services whereas others do not;
- A difference in telephone call rates across the district;
- Contact with the Council favouring those who are able to do so during office hours;
- Customers having to contact different departments to deal with a single issue e.g. to notify us of a change of address.

It should be noted that customer satisfaction with the general performance of the Council is high<sup>5</sup>. However, the issue the Council faces is that, in retaining its current structure, it has reached a ceiling as far as improvements to customer service are

concerned. Improvements can only be effected incrementally on an individual service basis. This will only serve to increase the inconsistencies which already exist within services as highlighted above. The Council, therefore, needs to take a corporate approach to improving service access by focussing on the needs and expectations of the customer.

### **3. Research – what is this telling us?**

In February 2003, the Council used its citizens' panel, Sounding Board, to canvass public opinion on how people preferred to contact the Council both now and in the future. Recognising that this was a relatively small sample of local opinion, the research was supplemented with a telephone survey of people who had recently contacted the Council and a random sample of local residents. This enabled over 1000 people to express their views.

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<sup>5</sup> 76% - Best Value General Survey 2000

The headline findings from both surveys were that:

- approximately three-quarters of all contact with the Council is by telephone;
- the current office opening times are seen as being convenient (with some, although not pronounced, interest in Saturday morning opening);
- there is a high percentage of internet access at home;
- there was little support for the provision of direct link terminals in local community facilities (e.g. post office, library, community centre);
- two-thirds of respondents thought that customer service would improve if a “single first point of contact” approach was developed; and
- customers want to use different access channels for different tasks.

### **3.1 Interpreting the Results**

The results of the consultation exercises have shown that, although customers still want to retain access to Council services through ‘traditional channels’, there is support for enhancing customer contact by electronic means. In particular, improving contact over the telephone by resolving the majority of enquiries at the first point of contact and enabling more ‘self-help’ services through the web site.

Whilst there was little support for the provision of direct link terminals in local community facilities, the Council recognises that the geography of the district is prohibitive to many people who may need to visit the offices at Follaton House, Totnes. The Council therefore needs to consider a range of options for providing access to services locally, recognising that a uniform approach across the whole district might be inappropriate.

The results illustrate that customers will look initially to use certain access channels depending upon the service they wish to access. It is also possible that customers will use one particular access channel at the outset then switch to another. An example would be completing an application form online, but seeking clarification by telephone.

Whilst the telephone remains, overall, the most popular access channel, other channels are seen as being more appropriate for other tasks. For example, the internet was the favoured method for searching for information and submitting applications for certain services. It is also the channel that lends itself to services such as Development Control which generates a significant number of customer enquiries. This will need to be considered when assessing the options for improving access.

## **4. The Devon-wide context – the Devon e-Partnership Strategy for Shared Access to Services in Devon**

The Devon e-Partnership brings together all local authorities in the county of Devon, including the Police and Fire Authorities and Dartmoor National Park. The e-Partnership’s role is to jointly address some of the key challenges associated with electronic service delivery.

One of the projects of the e-Partnership has been to produce a strategy for shared access to services. A two level approach has been agreed:

1. At a county-wide level, to set out an overarching framework with guiding principles and supporting actions for access to electronically delivered information and services.
2. At the local level, for the guiding principles to be applied in strategic plans which will define the level of access and interaction that should be expected in each locality or area of responsibility.

In supporting the principles for shared access to services on a county-wide basis, the Council recognises that there is a need to develop an effective infrastructure and culture for joining up its own services initially before it can effectively contribute to a partnership approach. The prime focus of this strategy is therefore on the achievement of this essential first step.

#### **4.1 Adopted Principles of Access**

In developing the Access to Services Strategy, the following assumptions and principles have been adopted<sup>6</sup>:

- Supported access is much more likely to be required than Internet self-help.
- The more a service / services can be delivered successfully at the point of first contact, the greater the levels of customer satisfaction there is likely to be and greater savings achieved.
- Experience indicates that the cut off point of first contact (i.e. the point when a query has to be referred to “the back office”) is higher than is anticipated by professional officers.
- The cut off point is lower with self-help access (but needs to be maximised in appropriate areas as it is a low overhead mode of delivery e.g. reporting abandoned vehicles).
- The main access channel for the present will be the telephone (but other channels will need to be developed e.g. face to face, internet, digital tv, text).
- Until one integrates front and back office (by process mapping / workflow) in any one area, traditional service barriers will not disappear. Once integrated the majority of service in transactional terms can be provided by anyone within a customer services unit.
- The biggest operational efficiencies / customer satisfaction returns are likely to be gained in high transactional, process based areas such as revenues and benefits and planning, but a scheduled programme must be put in place for all services that need to be e-enabled.
- Most authorities have found it essential (to remove traditional service barriers) to place their customer services unit centrally rather than within individual services.
- No benefits will accrue from merely replicating existing processes by electronic means. Opportunity should be taken to analyse existing processes

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<sup>6</sup> Executive, 10 April 2003

and seize the opportunity to re-engineer whenever that will result in improvements in service delivery. This is where process mapping and workflow is so important.

- We will find it hard to offer true partnerships to external organisations if we have not recorded carefully enough full details of how we deliver a service / services internally.
- Remote one stop shops are expensive and logistically difficult to service and maintain but are in any event unachievable without first securing internally the integration between front and back office referred to above.

## **5 Framework for Improving Access to Services**

The following framework for improving customer access to services takes into account the local and national context, the results of the research undertaken and the adopted principles of access.

### **5.1 The Customer Services Unit**

The main purpose of this approach is to centralise customer contact through a dedicated customer services team and contact centre. The Customer Services Unit will eventually handle all incoming service requests through whichever channel (acknowledging that the telephone will remain the preferred channel). For the customer, a single point of access to a number of Council services is provided, a high proportion of which will be resolved without need to refer the enquiry elsewhere.

The benefits of this approach are:

- Improved quality of customer service by being able to resolve the majority of enquiries at the first point of contact. Experience from other authorities suggests that up to 80% of enquiries into the Council could be dealt with by the Customer Services Unit without the need to refer to the back office;
- The opportunity to introduce extended opening hours;
- Increased productivity by reducing the volume of customer interactions on service professionals in the back office;
- Consistency in response to the customer through use of information and communications technology to ensure that the correct information is received from and provided to the customer;
- The possibility of some efficiency savings being realised (although this should be regarded as an ancillary benefit to improved customer service).
- The ability to recruit from a wider potential workforce by adopting flexible working arrangements: in turn this enables some people to enter into employment who would otherwise be denied that opportunity;
- The opportunity to mediate on behalf of services provided by other public authorities.

The Customer Services Programme will consist of a number of separate but related projects or work streams. All those components will be project managed using PRINCE2 methodology to ensure risks are controlled and minimised.

## 5.2 Customer Relationship Management

Central to the proposal to establish a Customer Services Unit is the procurement of ICT systems to enable it to function effectively. The first of these is a Customer Relationship Management (CRM) system.

It should be noted that CRM is principally a business and cultural strategy aimed at understanding and anticipating the needs of an organisation's current and potential customers rather than a piece of software. It is about maintaining a complete and unified view of the relationship between council and customer, available to all appropriate authority staff.

The CRM system will:

- integrate access from any channel to back office systems giving officers within the CSU access to relevant customer information through a single, consistent and accurate entry point;
- contain a knowledge base, which is a collection of the facts and rules required to deal with customers in prescribed circumstances;
- contain scripting / workflow capabilities to enable policies, processes and procedures to be adhered to consistently by all users; and
- contain relevant information about each customer, such as disabilities or language requirements.

In simple terms, the system will provide the means by which a Customer Service Officer sitting within the Customer Services Unit can identify the customer and then respond to a range of disparate enquiries.

Development and regular updating of the internet and intranet sites will be an important component of CRM as they both hold a library of information that enables customer enquiries to be answered.

## 5.3 Document Image Processing & Workflow

Document image processing offers the potential for the electronic capture, storage and management of literally every document generated or received by a council, including all paper correspondence, reports, application files, emails, and web content.

Workflow focuses on the business processes that make use of documents i.e. how the work gets done. This includes, but is not limited to handling enquiries submitted by different means. Implementing a workflow solution is aimed at improving the processes the Council uses and the way they are performed. This is achieved by automating the means by which documents, information or tasks are passed from one officer to another for action according to predetermined rules.

Process mapping is a prerequisite before CRM and workflow solutions can be implemented. Process mapping provides a unique opportunity to eliminate, or at least improve, arcane administrative processes.

## 5.4 The Devon Portal

The Devon Portal is a Devon e-Partnership project. Its purpose is to provide a portal i.e. “gateway” (via the web) linking to individual partner web sites. The partner web sites would also remain accessible in their own right.

The portal is due to go live (with initially limited capability) in April 2004 when the main elements will be:-

- The portal as signpost. The portal will provide a consolidated A to Z of local authority services and a search engine that operates across relevant partner web sites. This provides the option of a single point of access that directs users to the appropriate partner web sites. This will enable direct access or supported access.
- Collaboration on generic information content. All the councils of Devon publish information on their web sites, in varying degrees of detail and quality, about their services and how to use them. In the case of District Councils, much of this information will be generic – applicable to all Districts – although currently maintained on an individual basis. Through the portal project, the web content that is generic to many Councils will be maintained by one provider on behalf of all. There is potential for significant savings here achieved through economies of scale.
- Collaboration on online forms. Where partners delivering like services have not yet web-enabled their transactions, they can collaborate on developing online forms. These would still be branded with the relevant Council’s logo so the customer is clear which Council he or she is dealing with. The economies of scale argument is as equally relevant here as in the preceding paragraph.

There are four main high priority areas for further development. They are in the following areas:-

- Common content – provision of shared content for the partners’ key services, and of community information for Devon town and parish councils
- Authentication - a common means of authenticating citizens and partners (to an appropriate level for the service) across the Partnership in order to enable the provision of transactional services
- User-based developments – a customer-centric development programme based on portal requirements identified through user groups
- Other priority developments – a development programme, closely linked to the user-development programme based on shared high priority initiatives e.g. online job vacancies and applications

## **5.5 The Council’s Web Site**

As has been highlighted through the research, internet access is high within the district and the web site is the preferred access channel for information and to undertake specific tasks.

The long term objective for the site will be to progress through to fully transactional status. This recognises that the provision of a self-service facility will reduce the need for supported access through other channels and, therefore, is most cost-effective. Transactional facilities on the web site should be inextricably linked with those used in the Customer Services Unit to give a common look and feel to processes across different access channels.

In the short term, the purchase of the Obtree Content Management System will enable the site to develop from the current collection of service parts through to a corporate driven facility structured around the needs of the customer. It will also help to ensure that the site’s content is up to date and relevant to the user. As highlighted above, alongside the intranet, this will provide the knowledge base for the Customer Services Unit, emphasising the importance of the information being kept up to date. The site also has an important role to play in promoting the corporate image and brand.

## **5.6 Community Access Points**

Given the geographic nature of the district and broad dispersal of the population, we need to find appropriate means of providing facilities in local communities which provide a link to our services. The actual facility provided can vary from a network of one stop shops, video-conferencing links, free telephone links and internet kiosks.

Alternatively, visiting officers from specific services could be provided with mobile technology which enables them to provide information and services linked to those available in the Customer Services Unit.

The Council should not adopt a one-size-fits-all solution for all localities. A more flexible approach will enable a response to be made to different opportunities which might arise for example from local community plans or funding opportunities. A pilot project approach will enable the Council to review what works best for particular groups in particular communities for particular services. In terms of timing, the provision of remote access points in specific communities should follow implementation of the CSU.

## **5.7 Other Access Channels**

### **Digital Television**

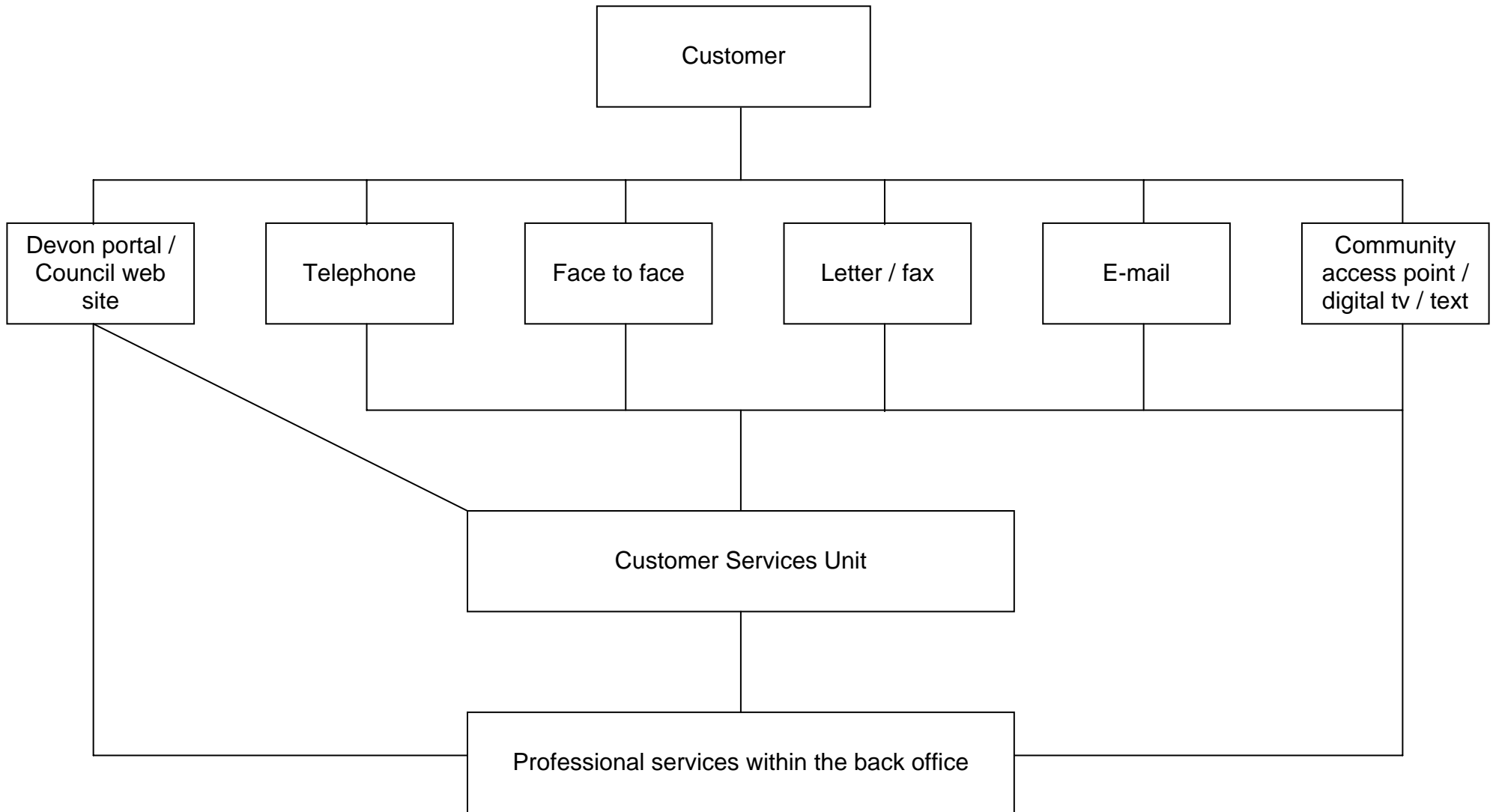
Our research demonstrated relatively low levels of digital television penetration throughout the district. Whilst we will monitor the progress of national projects, this will be a lower priority initially.

## **Small Message Service**

SMS, or text messaging, can be used to target young people and hard to reach groups and provide an initial point of contact between council and customer. As with digital television, progressing this access channel will be a lower priority initially.

## **6. Communicating the Strategy**

It is recognised that implementation of the projects highlighted within this strategy will change the experience of contacting the Council for many customers and other stakeholders. It is, therefore, an important component of the strategy to ensure that a co-ordinated communications plan is developed.



## 7. Action Plan

Activity	Action	Responsibility	Target Date
<b>Customer Services Unit</b>			
<b>Systems Work Stream</b>	CRM procurement	Systems Project Manager	September 2004
	CRM installation, configuration and integration with back office systems	Systems Project Manager	November 2004
<b>People Work Stream</b>	Recruitment of CSU Manager	People Project Manager	February 2004
	Recruitment of Customer Services staff – phase 1	People Project Manager	October 2004
	Training of Customer Services staff	People Project Manager	December 2004
	Internal Communications	People Project Manager	Ongoing to “go live”
<b>Process Work Stream</b>	Identification of phase 1 CSU services	Process Project Manager	January 2004
	Enquiry Mapping	Processes Project Manager	April 2004
	Business Process Mapping & Re-engineering – phase 1	Processes Project Manager	November 2004
	Business Process Mapping & Re-engineering – phase 2	Processes Project Manager	December 2004

	Business Process Mapping & Re-engineering – phase 3	Processes Project Manager	March 2005
<b>Facilities Work Stream</b>	Define facilities required and identify suitable office space	Facilities Project Manager	April 2004
	Office refurbishment and fitting out	Facilities Project Manager	September 2004
<b>DIP &amp; Workflow</b>			
	DIP & Workflow procurement	Systems Project Manager	Phase 2 of CSU Project
	System installation, configuration and integration with back office systems	Systems Project Manager	Phase 2 of CSU Project
	Staff Training	Systems Project Manager	Phase 2 of CSU Project
<b>Devon Portal</b>			
	Phase 1 go live	Officer E-Champion	April 2004
	Further development (subject to partner commitment) and progression to phase 2	Officer E-Champion	To be determined in accordance with business plan development
<b>Corporate Web site</b>			
	Implementation of content management software	Systems Project Manager	By September 2004

	Web site relaunch to include navigational structure and design	Systems Project Manager	By September 2004
	Staff training on content update	Systems Project Manager	By September 2004
	Implementation of additional functionality to achieve fully transactional status	Systems Project Manager	To be defined as part of development of Programme Plan for CSU
<b>Community Access Points</b>			
	Map existing enquiry points for Council information	To be determined	To be determined post CSU
	Respond to opportunities to introduce community access points using local community plans as the driver	To be determined	To be determined post CSU
<b>Other Access Channels</b>			
	Explore opportunities offered by digital television, SMS text messaging and other access channel technology	E-Government Group	Ongoing
<b>Promotion of Services</b>			
	Produce and implement a communications plan to create greater awareness amongst customers and residents of the service available from the Council	E-Government Group and PR Officer	By end of April 2004

## 8. Targets

	<b>Indicator</b>	<b>Target</b>
<b>1</b>	Percentage of residents surveyed finding it easy to access key Council services	Baseline to be established following Sounding Board Survey 5 (July 2004)
<b>2</b>	Percentage of residents surveyed rating our quality of service as good or very good	Baseline to be established following results of Best Value General Survey
<b>3</b>	The number of types of interactions that are enabled for electronic delivery as a percentage of the types of interactions that are legally permissible for electronic delivery	100% of interactions by 1 January 2006

NB. Specific targets relating to the performance of the Customer Services Unit are being established as part of the Process Work Stream.