

# Scoping Document

**Name of Review/Project:**

**Customer Services and Payment Facilities at the Civic Offices**

**Terms of reference:**

A report was considered by the Finance and Management Committee on 16<sup>th</sup> October 2014, regarding the introduction of cash machines in the Civic Offices, for people paying bills. The report also considered the more fundamental issue of current payment facilities being withdrawn, together with the need to provide a better experience for people contacting the Council and visiting the offices with queries and looking for information.

The Finance Committee agreed that the issue of payment facilities should be reviewed by the Overview and Scrutiny Committee and that this should be part of a wider review of Customer Services given the increasing demand from people contacting the Council.

**Please provide details of relevant Corporate Plan Themes and Priorities:**

Value for Money Theme, with a key project (VO 4) “an improved customer experience.”

**Key Issues and Aim(s) of the Review**

- To review the provision of payment facilities in the Civic Offices and the potential benefits of introducing cash machines.
- To review the service provided to people contacting the Council and visiting the Civic Offices, to determine whether this can be improved.

**Why should the review take place now?**

There has been a steady increase in the number of transactions that Customer Services have been dealing with over the last 2 to 3 years due to the growth of the area.

In addition, the nature and length of queries has increased, due to changes in welfare reform in particular. At peak times, this becomes exacerbated for people visiting the offices to make payments and to resolve queries. This is usually at the same time as telephone calls in the Contact Centre increase.

The Council has a broad Customer Access Strategy which is designed to make it easier for people to contact and transact with the Council; this is mainly based on extending the use of technology.

This review would be a part of that longer-term strategy.

**Potential outcome/s**

- A change to payment services/facilities within the Civic Offices.
- A change to services provided; for example, opening times, provision of self- service terminals, the layout of the reception area.
- Changes to how visitors are filtered when arriving.
- Changes to the Telephone System.

**What will not be included:**

- Whether to replace the IT systems, i.e. the Customer Relationship Management (CRM) System and the Cash Receipting System. These are the tools used to deliver the service and are considered to be fit for purpose. It is considered that they would be best reviewed (if necessary) following this project depending on whether the service is revised.
- The Northgate Contract itself, although it may be that some of the KPI's are reviewed.

**Potential Risks or Limiting Factors:**

- The overall level of resources deployed (although how they are deployed may come under review or additional resources may be identified).
- Any proposed changes are not affordable.
- The Northgate Contract.

*Note: The IT systems are not considered to be a limiting factor at the outset albeit it may be found that greater use could be made?*

**Members undertaking the Review (if a sub-group is to be used):**

To be advised

**Possible co-options:**

None at this stage

**Which policy committee(s) does it relate to?**

Finance and Management Committee

**Key stakeholders/ consultees:**

- Local residents and visitors
- Staff in Customer Services
- The Client Unit (who monitor volumes and performance)

**Potential contributors and research required:**

None at this stage.

**Potential visits:**

- Observing the service in the reception area and in the Contact Centre
- Another local authority

**Are there any Budgetary Implications?**

Not at this stage; it is considered that the review can be undertaken within existing resources.

**Officer support required:**

Advice from the Director of Finance and Corporate Services

**Period for Review:**

Start date: **October 2014**

Proposed completion date: **April 2015**

**Phase 1:**

- Ascertain current service provision - volumes, issues, etc.
- Spend time in the service area
- Outline options for payments and any other changes

**Phase 2:**

- Review options for cash payments and other changes identified

**Phase 3:**

- Consider any changes with recommendations to Finance Committee

**Report date(s) to committees:**

22<sup>nd</sup> October 2014

- Agree scope of review

- Consider volumes and key performance data

#### December 2014

- Report back on observations from service visit
- Outline options for any changes, including payment facilities

#### January 2014

- Progress on actions

#### February 2014

- Consider detail options for change

#### April 2015

- Report back and recommendations to Finance Committee

#### **Publicity (e.g. of recommendations)**

Any changes will affect local residents and people contacting the Council. Therefore, it is expected that sufficient communication through various channels will need to be completed prior to implementation.

**Date Scoping Document Approved:**

**Overview and Scrutiny Committee 22<sup>nd</sup> October 2014**