

MEDIUM-TERM FINANCIAL PLAN
SAVING PROPOSAL TEMPLATE

DIRECTORATE:	Education and Corporate Services
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SERVICE AREA:	Customer and Digital Services
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1. GENERAL INFORMATION

SAVING PROPOSAL:	<p>B13 Central Services (Part-year saving in 2020/21 of £24k. Full-year saving of £48k) – Redesign of the current offering to include the extension of self-service collections from single points in all offices and implementing alternative methods of working linking into digitalisation of the receipting and circulation of documents across the organisation.</p> <p>B12 Customer Services (Part-year saving in 2020/21 of £68k. Full-year saving of £136k) - Redesign Customer services offering to provide a more customer focused service with alternative service options. Areas of redesign to include:- Outlets of service provision, service provision delivery times, service delivery options (electronic, face to face, appointments)</p> <p>D24 Digital Services (2020/21 saving of £200k) – Redesign business operations within Data Centre and Rationalisation of Products / Systems</p> <p>D22 Procurement Services (2020/21 saving of £10k) – Income Generation</p>
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BUDGET AREA:	Customer and Digital Services
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TOTAL BUDGET FOR THIS AREA:	£3,543,881.00	% OF TOTAL BUDGET IN SAVINGS PROPOSAL:	10.8%
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TOTAL SAVING:	£384,000.00
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PLEASE PROVIDE A DESCRIPTION OF HOW THE SAVING WILL BE ACHIEVED:
<p>Central Services - Redesign of the current offering to include service provision delivery and collection times' reduction supported by the extension of self-service points in all offices and implementing alternative methods of working linking into digitalisation of the receipting and circulation of documents across the organisation.</p> <p>Modernisation of operating practices. All mail to be collected from central points by extending the self-service initiative and scanned from a central point. Delivery will then be electronic to all areas of the business. The business will need to be encouraged to move to electronic communications, for day to day business and all meetings as hard copy communications to members, officer, the public and other</p>

organisation to be provided limited to special cases. No delivery services from the mail room as all documents will be sent electronically.

This initiative will link closely to the centralising of invoice processing and so working practice and technology where possible can be shared.

Customer Services - Redesign of delivery model affecting all customer service centres:

Promotion of Direct Debits, Online Payments and Post Office Card Payments to support rationalisation of sites and opening hours for revenue collection centres.

Discontinue receipting cheque payments via the post.

Close all sites on a Saturday.

Relocate Pontlottyn Customer Services to Rhymney Library.

Reduce Newbridge cash office to one day a week.

Ty Penallta to offer a drop in and appointment-based service.

Caerphilly, Blackwood, Risca, Bargoed to offer an appointment only delivery model with revenue collection on a reduced basis.

Promotion of self service and web-based services.

Digital Services –

- Migrate our endpoint protection and secure email to Microsoft product set - The implementation of Microsoft Office 365 will allow us to use some of the security products available through Microsoft, these will provide end point protection for our corporate devices. We will also have access to collaborative tools for sharing information and sending secure emails.
- Move to SIP technology for incoming and outgoing telephone calls, enabling ISDN lines to be ceased - As the telephony project progresses, we will move our telephone number ranges from the existing ISDN lines to the SIP data circuits, this will enable the ISDN lines to be ceased.
- Rationalization of products/systems

Procurement Services – Income generation through collaborative procurement arrangements.

2. PUBLIC IMPACT ANALYSIS

PLEASE DESCRIBE HOW THE PROPOSED SAVING COULD **IMPACT UPON THE PUBLIC:**

CONSIDER THE 5 WAYS OF WORKING, IN PARTICULAR, *LONG-TERM* IMPLICATIONS FOR FUTURE GENERATIONS AND *PREVENTATIVE SERVICES*. RECOGNISING THAT SAVINGS MAY SECURE FUTURE PROVISION, OR MAY BE NEEDED TO SECURE PROVISION IN ANOTHER AREA.

All proposals above for Customer and Digital Services are providing enhanced services not reduction in service however it does mean an alternative delivery method of some services.

Long-term guidance: Consider the importance of balancing short-term needs with the need to safeguard the ability to meet long-term needs.

Central Services - The intention of this proposal is to provide an enhanced service not a reduction in service however it does mean an alternative delivery method will need to be adopted across the Authority.

The impact is of moderate service disruption as follows:

Customers will need to be able and willing to receive correspondences in digital formats.

Customers will find a change on this scale difficult to adapt to which will be expressed as noticeable dissatisfaction.

We recognise that we need to take an inclusive approach to ensure that we provide equal access to our services for all sections of the community. Developing our digital offering to create a positive customer experience must be tempered with options of alternative service options for those who are not able or are yet to develop the ability to transact and communicate in a digital way. However, our inclusive approach will need to be carefully managed and traditional methods of communication being used by exception for the most in need cases.

Where statutory services require an outbound hard copy correspondence the reduction in operating times will impact on this service. As part of the implementation plan the statutory services will be identified to minimise the effect of this change.

Where a discretionary service requires an outbound hard copy correspondence the reduction in operating times will impact on this service.

The mail service affects a large proportion of our customer based across all areas of the Authority which give the potential for regional public concern.

Prevention guidance: Consider whether the proposed saving is affecting a preventative area that reduces future burdens and supports well-being.

The proposal is linking to the digital transformation agenda with the intention of extending more efficient ways of circulating correspondences to minimise the effect on preventative areas that reduces future burdens and supports well-being.

It is worth noting that social services are a high user of hard copy mail and as part of the implementation plan other secure formats of delivery methods will need to be adopted so not to affect outcomes to vulnerable or in need citizens within our communities.

Customer Services - Moderate Public Impact as follows:

The intention of this proposal is to provide a more focused approach to customer service and maximise the benefits of every access channel available to our communities, including sustaining local business through the promotion of post office-based payments.

This level of change will not affect the ability to deliver statutory services however will have a potential to have moderate levels of service disruption whilst Customers come accustomed to the changes.

This change will bring noticeable customer dissatisfaction as high percentages of communities are regular customers at centers.

Customer will perceive the change as a significant disruption to discretionary services despite the intention of offering a delivery model that uses resources in a more efficient way to deliver a focused service to the customer and this is likely to attract regional public concern

We recognize that we need to take an inclusive approach to ensure that we provide equal access to our services for all sections of the community. Developing our digital offering to create a positive customer

experience must be tempered with options of alternative service options for those who are not able or are yet to develop the ability to transact and communicate in a digital way. However, our inclusive approach will need to be carefully managed and traditional methods of service delivery being used by exception for the most 'in need' cases only.

Prevention guidance: Consider whether the proposed saving is affecting a preventative area that reduces future burdens and supports well-being.

N/A

Digital Services –

- The move to Microsoft technologies will progress rationalisation of contracts and products and will enable easier management, return on investment for purchasing Office 365 and a single product set for our devices. Prevention guidance: Consider whether the proposed saving is affecting a preventative area that reduces future burdens and supports well-being. This technology will protect devices assisting the agile agenda and enabling collaboration in a safe manner.
- The move to SIP technology will ensure that the Authority has moved to the newer technology well before the telephony providers stop installing and supporting the older technology in 2025. Prevention guidance: Consider whether the proposed saving is affecting a preventative area that reduces future burdens and supports well-being. This technology will facilitate agile working and provide flexibility and resilience in handling telephone calls.
- Rationalization of product and systems will have limited impact on the general public

Procurement and information Services – No impact.

DOES THE PROPOSAL HAVE THE POTENTIAL TO IMPACT MORE GREATLY ON PEOPLE WITH PROTECTED CHARACTERISTICS? (PLEASE TICK) (AGE, DISABILITY, GENDER REASSIGNMENT, MARRIAGE or CIVIL PARTNERSHIP, PREGNANCY AND MATERNITY, RACE, RELIGION or BELIEF, SEX, SEXUAL ORIENTATION)	YES	NO
	Customer Services - Yes	Central Services - No Digital Services – No Procurement and information - No
<p>NB * IF YES, PLEASE COMPLETE AN EQUALITY IMPACT ASSESSMENT (EIA) SCREENING. THIS WILL DETERMINE WHETHER A FULL EIA IS NEEDED. FOR FURTHER ADVICE AND GUIDANCE PLEASE SEE THE POLICY PORTAL. SCREENING FORMS AND ANY EIAs WILL NEED TO BE APPENDED TO ALL DECISION REPORTS RELATED TO THE PROPOSED SAVING.</p>		

PLEASE DETAIL ANY CONSULTATION THAT HAS BEEN UNDERTAKEN IN CONSIDERING THIS PROPOSAL. SUMMARISE ANY FEEDBACK RECEIVED.		
CONSIDER THE 5 WAY OF WORKING, IN PARTICULAR, <i>INVOLVEMENT</i> .		
<p>Involvement guidance: Consider whether you have involved people who have an interest in the service area, including service users and potential service users.</p> <p>None as yet we will need to start to develop this going forward.</p> <p>Digital Services –</p> <ul style="list-style-type: none"> Briefing paper has been discussed with CMT and Members and expenditure for Microsoft products has been approved. Briefing paper has been discussed with Director, long term there will be no option if voice channels with the Authority continue to be used as service providers will no longer offer ISDN technology. 		
IS FURTHER CONSULTATION REQUIRED BEFORE THIS PROPOSAL CAN BE IMPLEMENTED? (PLEASE TICK) PLEASE SEEK GUIDANCE FROM CORPORATE POLICY, WHO CAN ADVISE ON THE GUNNING PRINCIPLES, IN PLANNING ANY CONSULTATION.	YES	NO
	Central Services - Yes	Customer Services - No Digital Services – No Procurement and information - No

TAKING ACCOUNT OF THE ABOVE AND THE IMPACT RATING DEFINITIONS, PLEASE INDICATE THE PUBLIC IMPACT RATING APPLICABLE TO THIS SAVING PROPOSAL (PLEASE TICK):				
NIL IMPACT	MINOR IMPACT	MODERATE IMPACT	SIGNIFICANT IMPACT	CRITICAL IMPACT
Procurement and information Digital Services	Central Services	Customer Services		

3. ORGANISATIONAL IMPACT ANALYSIS

PLEASE DESCRIBE HOW THE PROPOSED SAVING COULD IMPACT UPON THE ORGANISATION AND FUTURE SERVICE PROVISION:
<p>Central Services - Organisation impact will be in the main cultural. People doing more for themselves via electronic means. Part of the initiative is adopting digital approaches which will rely on the agreement of the constitution’s wording to be changed and members using the mod.gov digital platform for all committee papers as the agenda dispatch service would be ceased. It is anticipated that the proposal will attract some media interest resulting in local press interest.</p> <p>Customer Services - The change will attract negative regional press/media coverage and political coverage as the concept will be viewed as removing front line services despite the intention of delivering services in a more focussed approach. Customer services deliver services on behalf of other services as Income Section, Council Tax, Housing Benefit, Rents, Housing and Passenger transport services and the remodelling and perception of the change could reflect on these offerings. With the exception of Ty Penallta, the proposal continues to support the co-location of Customer Services within libraries across the borough. The changes to the operating times and delivery method based on past</p>

experience will cause the library team workload in fending customer dissatisfaction especially where the Customer service team are not present.

The change also has the potential to increase demand via the corporate complaint process.

Digital Services –

- This technology will protect devices against malware and computer viruses; it will also encrypt hard drives to protect information stored on it. Microsoft products will ease the ability to collaborate across the Organisation and with other Organisations.
- This technology will facilitate agile working and provide flexibility and resilience in handling telephone calls. It will deliver technology that is future proofed.

Procurement and information Services – Currently Nil however resource will need to be monitored.

PLEASE DESCRIBE HOW THE PROPOSED SAVING WILL IMPACT UPON MEMBERS OF STAFF:

Central Services - The proposal will reduce the head count in the mail room by 40%. The team will need to embrace the change and we will need to support the development of digital skills.

Customer Services - This will reduce the FTE from the in-person team by 25%. (5 FTE). Due to the large number of part time employees this will affect more than five members of the team. Reduction in head count is inevitable and the intention will be to use the workforce planning approach to minimise impact however redundancies may be a result of this proposal should other financially viable options not be viable. It will also impact on the library team as they will front customer dissatisfaction, especially when the customer service team is not present.

Digital Services –

- Staff will need to embrace the new technologies and familiarise themselves with the new product set.
- This will enable staff to work differently in ways that will meet the agile policy creating flexibility and resilience creating improved work life balance.

Procurement and information Services – Nil at the moment however a review of resource levels will be required as the collaboration grows.

NUMBER OF FULL-TIME EQUIVALENT (FTE) STAFF IN BUDGET AREA AFFECTED:

Central Services – 2.0 FTE
Customer Services – 5.0 FTE (Grade 5)
Digital Services – 0
Procurement and information Services – 0

NUMBER OF POSTS IN BUDGET AREA AFFECTED:

Central Services – 2 (1 External Courier/1 Clerical Assistant Grade 3)
Customer Services – TBC due to large number of part time employees.

	Digital Services – 0 Procurement and information Services –
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NUMBER OF POSTS AFFECTED BY THE PROPOSED SAVING:	Central Services – 2 (1 External Courier/1 Clerical Assistant Grade 3) Customer Services – TBC due to large number of part time employees. Digital Services – 0 Procurement and information Services –0
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PLEASE SPECIFY HOW THIS WILL BE MANAGED:	HOW MANY POSTS?
POST(S) ALREADY VACANT:	Central Services – 1 Customer Services – 0 Digital Services – Procurement and information Services –
VOLUNTARY SEVERANCE:	Central Services – 0 Customer Services – 0 Digital Services – 0 Procurement and information Services –
RETIREMENT:	Central Services – 1 (TBC) Customer Services – 0 Digital Services – 0 Procurement and information Services –
REDEPLOYMENT:	Central Services – 0 Customer Services – 0 Digital Services – 0 Procurement and information Services –
REDUNDANCY:	Central Services – 0 Customer Services – 6 Digital Services – 0 Procurement and information Services –

PLEASE PROVIDE DETAILS OF WHEN THIS WILL BE IMPLEMENTED:	Work is already underway on key projects – 19/20 March 20/21 will see the start of wider service redesign Central Services – August 2020 Customer Services – August 2020 Digital Services – <ul style="list-style-type: none"> • 2020 (as products reach the end of their contractual term) • 31/03/2020 Procurement and information Services – March 2020
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WILL THE PROPOSED SAVING HAVE AN IMPACT ON ANOTHER DIRECTORATE, SERVICE AREA OR TEAM WITHIN THE COUNCIL? (PLEASE TICK)	YES	NO
	Central Services – Yes Customer Services – Yes Digital Services – Yes x 1	Digital Services – Yes x 1
WILL THE PROPOSED SAVING HAVE AN IMPACT ON ANOTHER PUBLIC SECTOR PARTNER, OR VOLUNTARY SECTOR PARTNER? (PLEASE TICK)	YES	NO
	Digital Services - Yes	Central Services – No Customer Services - No

IF YES, PLEASE CONSIDER THE 5 WAYS OF WORKING, IN PARTICULAR *INTEGRATION*. DESCRIBE BELOW:

- THE AREA(S) AFFECTED; AND
- HOW THE PROPOSED SAVING WILL IMPACT

Integration guidance: Consider how the proposal will impact on other service areas, or partners, and their ability to meet their objectives.

Central Services - The proposal will require all services to adopt a digital first approach to correspondences. This should not impact on objectives in a negative way as exceptions to a digital first approach will be considered where specific needs can be evidenced as an exception not the rule. The team will need to embrace the change and we will need to support the development of digital skills.

Customer Services - The Customer service team deliver services on behalf of other services such as the Income Section, Council Tax, Housing Benefit, Rents, Housing and Passenger transport services and the remodelling and perception of the change could reflect on these offerings. These services will still be supported on the front line but in a more focussed delivery model.

Digital Services –

- The introduction of these technologies will facilitate improved collaboration and the agile agenda.
- Will help to reduce call costs through the corporate contract. All calls made to other people on the network will be free. Ability to have flexibility in delivering services. Resilience in inclement weather.

Procurement and information Services – Nil

HAVE ANY OPTIONS BEEN CONSIDERED TO MITIGATE ORGANISATIONAL IMPACT?
PLEASE PROVIDE DETAILS OF ANY MITIGATION.

IN ADDITION, CONSIDER THE 5 WAY OF WORKING, IN PARTICULAR, *COLLABORATION*.

Collaboration guidance: Acting in collaboration with any other service or partner to meet objectives.

Central Services - The project can link into the centralisation of invoice process to share working principles. The team will need to embrace the change and we will need to support the development of digital skills.

Customer Services - N/A

Digital Services –

- The introduction of these technologies will facilitate improved collaboration.
- Working with telephony service provider to achieve migration and cost savings.

Procurement and information Services

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TAKING ACCOUNT OF THE ABOVE AND THE IMPACT RATING DEFINITIONS, PLEASE INDICATE THE ORGANISATIONAL IMPACT RATING APPLICABLE TO THIS SAVING PROPOSAL (PLEASE TICK):				
NIL IMPACT	MINOR IMPACT	MODERATE IMPACT	SIGNIFICANT IMPACT	CRITICAL IMPACT
Digital Services	Central Services	Customer Services		

3. LINKS TO POLICY AND CORPORATE OBJECTIVES

DOES THE SAVINGS PROPOSAL LINK TO ANY OF THE FOLLOWING? IF SO, PLEASE SPECIFY AND STATE WHAT THE IMPLICATION MAY BE.		
POLICY AREA	WHAT IS THE LINK?	WHAT WILL BE THE IMPACT?
CORPORATE PLAN and WELL-BEING OBJECTIVES (please state which objectives)	Customer and Digital Strategy	Positive Impact
STATUTORY DUTIES		
WELSH GOVERNMENT GUIDANCE or STRATEGY		

4. RISK(S) AND SENSITIVITIES

HAVE ANY RISKS BEEN IDENTIFIED IN CONNECTION WITH THIS SAVING PROPOSAL? (PLEASE TICK)	YES	NO
	Central Services - Yes Customer Services - Yes Digital Services – Yes x 1	Digital Services – No x 1
IF YES, PLEASE SPECIFY BELOW:		
PLEASE CONSIDER RISK TO SERVICE USERS, LOSS OF PREVENTATIVE SERVICE AND FUTURE IMPACTS, FINANCIAL RISK, RISK TO STATUTORY PERFORMANCE etc.		
<p>Central Services – The risk associated to the modernising of the service are considered to be:</p> <ol style="list-style-type: none"> To adopt a digital first approach there needs to be a cultural adoption of initiatives to support the modernisation approach. If all services across the Authority do not adopt a digital first approach in corresponding with the public, internal and external partners then the savings within the proposal would be at risk of being achieved without significant impact and increased pressure being put on the remaining staff in the mail room post the savings being implemented. 		

2. There could be workload implications on the remaining team post implementation should we have a high demand from customers who are not able or are yet to develop the ability to transact and communicate in a digital way and exceptions are put in place to deliver the service in traditional methods.
3. Members not embracing a digital first approach and the adoption of the mod.gov delivery platform for committee papers.

Customer Services –

1. To adopt a digital first approach there needs to be a cultural adoption of initiatives to support the modernisation approach. If all services across the Authority do not adopt a digital first approach in serving the public and promoting alternative methods of payments and services, then the savings within the proposal would be at risk of being achieved without significant impact and increased pressure being place on the team.
2. There could be workload implications on the remaining team post implementation should we have a high demand from customers who are not able or are yet to develop the ability to transact and communicate in a digital way and exceptions are put in place to deliver the service in traditional methods.

Digital Services –

- None
- As the quantity of telephone numbers increases on SIP and the voice traffic increases accordingly there may be a need to increase the number of SIP channels to allow increased consecutive calls to be made.

Procurement and information Services – Limited risks however if local authorities decide not to purchase from DPS and other collaborative arrangements there is a risk of limiting income.

PLEASE SPECIFY BELOW HOW THESE RISKS/SENSITIVITIES WILL BE MITIGATED?

NOT ALL RISKS CAN BE MITIGATED. SOME MAY NEED TO BE TOLERATED IN THE CONTEXT OF BUDGET PRESSURES.

Central Services – We have commitment from the leadership team to supporting the principle of the Customer and Digital Strategy.

Customer Services – We have commitment from the leadership team to supporting the principle of the Customer and Digital Strategy.

Digital Services –

- None
- Increase the number of SIP channels if budget permits.

Procurement and information Services – development of fit for purpose and flexible arrangements

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5. OTHER RELEVANT INFORMATION

PLEASE USE THIS SECTION TO PROVIDE ANY OTHER RELEVANT INFORMATION WHICH YOU FEEL HAS NOT BEEN CAPTURED.

Central Services – N/A
Customer Services –
Digital Services –
Procurement and information Services

HEAD OF SERVICE:

DATE OF COMPLETION: