

# Personnel Committee

## Client Side Function and Customer Service Support

18 November 2009

### Joint Report of the Head of Customer Service and Resources and the Head of Finance

#### PURPOSE OF REPORT

This report sets out a proposal to form a multi skilled Customer Service Officer (Specialist) role (2.5 FTE) and the need for 3 FTE Customer Service Advisors to deal with the additional volume of work.

This report is public

#### **Recommendations**

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The meeting is recommended:

- 1) To resolve to approve the job descriptions and grades proposed in this report as part of the outsourcing of the back office elements of revenues and benefits. These roles will support the internal functions and ensure a high quality service to our residents.

#### **Executive Summary**

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##### **Introduction**

- 1.1 As part of the revenues and benefits outsourcing exercise, a decision was made to retain some elements of the existing service - NNDR calls, visiting functions and Business to Business enquiries. The transfer of the NNDR telephone calls and face to face enquiries is necessary to allow the transactional elements to be outsourced. Each section has separate visiting officers that only visited for a particular service. This report sets out a proposal to form a multi skilled Customer Service Officer (Specialist) role (2.5 FTE) and the need for 3 FTE Customer Service Advisors to deal with the additional volume of

work.

- 1.2 The specialist role retains the home visiting functions when required but the emphasis will be on wider outreach - working with all sections of the community, focusing on the hard to reach groups on a daily basis and attending and organising community events to raise the awareness of all of the services Cherwell District Council provides that can help improve lives. As part of the revenues and benefits outsourcing exercise, a decision was made to retain the corporate debt collection elements of the service in-house. A review of the current processes across the organisation highlighted that debt recovery was taking place in different departments across this council. This report sets out a proposal to form a single corporate debt collection function and details the changes in roles and resources required to optimise income collection for the Council.
- 1.3 The monitoring of the contract awarded to Capita will be performed by a new service assurance team which will manage the external relationship and ensure internal SLA's are being delivered. This team will be responsible for ensuring the quality of the outsource service and charged with ensuring performance is on track and to target.

## **Background Information**

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- 2.1 The Executive agreed to outsource the back office functions of the revenues and benefits service at the Executive on 5<sup>th</sup> October 2009. The decision was based on investing in additional resources to manage the performance of the contract and additional resources for customer service to deliver the customer facing services.

The Council will set up a service assurance team – this team will consist of 4 FTEs:

- Service Assurance Technical Specialist Benefits – this post will be responsible for quality assurance and performance management of the outsourced contract from a highly technical perspective with regard to benefits. They will require excellent interpersonal skills to go with their expert benefits knowledge and have extensive experience of high level administration within this area.
- Service Assurance Technical Specialist Local Taxation/NNDR - this post will be responsible for quality assurance and performance management of the outsourced contract from a highly technical perspective with regard to Local Taxation and/or NNDR. They will require excellent interpersonal skills to go with their expert revenues knowledge and have extensive experience of high level administration within this area.

- 2 x Service Assurance Officer – these posts will support the Technical Specialists in ensuring contract compliance and promoting excellent service delivery through the achievement of the agreed KPIs. These roles will largely involve the quality checking of the data input by our preferred supplier as well as the management information reports that they supply and so the offices will need to have a sound working knowledge of benefits and revenues administration.
- 2.2 The council will retain the telephone and face to face enquiries relating to NNDR and the visiting functions for each service. The visiting element is currently carried out by individuals within each individual service (Council Tax, Benefits, NNDR), with no coordination or synergy. Calculations indicated that the amount of work remaining in the Council post-transfer would require a further three FTE`s so a total of six full time posts would be transferred to Customer Service Team:
- 2.3 These posts will be split as 3 Customer Service Advisors initially dealing just with the transfer of the NNDR service and calls that were previously business to business calls to the services, but over time, broadening their knowledge and sharing their own knowledge so that they become the full multi-skilled CSA within a year (and conversely, all other CSA`s acquire the NNDR knowledge).
- 2.4 A further 2.5 Customer Service Officers (Specialists) posts will be recruited. These roles require expert knowledge in one or more of the service areas delivered by customer service (in this initial intake this is likely to be revenue and benefits). The primary role is to understand and meet the needs of our community – particularly the hardest to reach and those most in need, and to devise a programme of contact through community groups and events to increase access to, and awareness of the services we and our partners offer. This is a natural extension of the outreach being achieved through our Linkpoint kiosks in rural areas, urban centre LinkPoint offices, online and telephone services.
- 2.5 At present there is limited proactive cross service information delivery or outreach in the community – this work is generally done within specific services and focused on one group or one kind of service. Given the broad – and extending – scope of service delivery through Customer Service it is sensible to take a “whole council” message out to the community, exploiting the customer service team’s wide knowledge of council services and deep understanding of customer need.

## **Key Issues for Consideration/Reasons for Decision and Options**

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The following options have been identified. The approach in the recommendations is believed to be the best way forward

**Option One** To agree the creation of the 4 posts within the Service Assurance team and the 6 additional posts in Customer Service.

**Option Two** To request an alternative approach to meeting the continuing obligations arising from the contract with Capita to deliver the “client” elements of the revenues and benefits service.

## **Implications**

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### **Financial:**

The financial effects of approving these 10 roles are detailed in the table below.

<b>Staff</b>	<b>Posts</b>	<b>Grade</b>	<b>Cost</b>	<b>Total</b>
Customer Services Officers	3	Gr8	£23,886	£71,658
CSO Specialists	2.5	Gr14	£34,478	£86,195
Service Assurance Technical Specialist	2	Gr18	£45,550	£91,100
Service Assurance Officer	2	Gr12	£29,829	£59,658
				<b>£308,611</b>
<b>ERI</b>				£1,823
<b>Total Staff Costs</b>				<b>£310,434</b>

These costs were included in the financial appraisal that considers the outsourcing proposals from the suppliers. This structure amounts to £310,434 an increase of £48,126 from the proposal in the report to the October executive.

The award of the contract to Capita generated a saving of £420,000 annually after the investment of £262,308 in additional roles. A risk provision of £75,000 was set up to cover any additional costs and the additional £48,126 can be funded through this risk reserve,

### **Risk Management:**

The risk associated with not approving the recommendations is contained in this report.

- Managing the performance of the Capita outsourced contract is extremely important to ensure that the processing of benefits is within satisfactory timescales and to ensure that residents of the district receive a high quality service.
- We would not meet the needs of vulnerable customers who

- require home visits
- The increased work as an effect of the transfer on NNDR would have an effect on performance of the whole team and consequently all services delivered through Customer Service.
- We would be unable to take our services out into the community as a continuation of the access to LinkPoint services theme.

The risks associated with approving these recommendations are:

- Although posts are ring fenced internally in the first instance we may not be able to recruit from internal candidates. This would mean an external process that may not be completed in time for the commencement of the contract on 1<sup>st</sup> February 2010.

**Efficiency:**

The savings associated with the total financial impact of the outsourcing of the back office functions will count as an efficiency in 2010/11 and help towards our target.

At present there are number of officers that visit only for specific services. With the proposed structure, each officer will visit for all services, thus maximising the knowledge offered to customers and allowing bundles of related services to be offered or explained, without the customer needing to know about them and ask about them.

This structure would see what are currently very resources with a very specific knowledge set become more generic and able offer advice in all services, with no increase in management resources: these six posts will report into the existing Customer Service management structure.

As an additional point, coordination of visits will be such that the new programme will contribute to reducing carbon footprint as the visit/events will be in a controlled geographical order.

Comments checked by Karen Muir , Corporate System Accountant  
01295 221559

**Wards Affected**

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All

**Document Information**

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Appendix No	Title
Appendix A	Job Description and Person Specifications
<b>Background Papers</b>	

Executive Report 5 October 2009

<b>Report Author</b>	Karen Curtin, Head of Finance Pat Simpson, Head of Customer Services
<b>Contact Information</b>	01295 221551 <a href="mailto:Karen.curtin@Cherwell-dc.gov.uk">Karen.curtin@Cherwell-dc.gov.uk</a>  01295 227069 <a href="mailto:pat.simpson@Cherwell-dc.gov.uk">pat.simpson@Cherwell-dc.gov.uk</a>