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**REPORT TO: POLICY AND RESOURCES COMMITTEE ON 24 NOVEMBER 2015**

**SUBJECT: DIGITAL SERVICES**

**BY: CORPORATE DIRECTOR (CORPORATE SERVICES)**

**1. REASON FOR REPORT**

- 1.1 To invite the Committee to review the progress made in relation to the Digital Services project approved on 14<sup>th</sup> April 2015.
- 1.2 This report is submitted to Committee in terms of Section III (A)(48) of the Council's Scheme of Administration relating to information technology.

**2. RECOMMENDATION**

- 2.1 **It is recommended that Committee consider and note the progress made against the Digital Services project and that a further progress report will be submitted in 6 months.**

**3. BACKGROUND**

Vision Aims and Objectives

- 3.1 The Digital Services project was approved by Policy & Resources Committee on 14<sup>th</sup> April 2015 (paragraph 9 of the Minute refers) and contained within it a series of aims and objectives which have been pulled together into a single summarised document (**Appendix 1**).
- 3.2 These aims and objectives highlight the desire to put the customer at the heart of the project and deliver consistent services regardless of access channel.

Project Planning and Governance Arrangements

- 3.3 The need for an agile approach to allow the project to grow organically as our understanding of the technology and the needs of the public develop was identified in the report to Committee on 14<sup>th</sup> April 2015. For this reason an overarching 3 year plan has been developed with the expectation that high level objectives will continue to be met but the details of any particular products or deliverables may change as the project evolves. The timeline of

high level deliverables for 2015/16 is contained in **Appendix 2** with the shaded boxes representing completed activities.

- 3.4 Governance arrangements will be important to ensure the success of the project and the governance structure contained in **Appendix 3** was approved by the Digital Services Working Group on 24<sup>th</sup> September 2015 and subsequently by CMT/SMT on 5<sup>th</sup> October 2015. In essence the project will have Project Teams responsible for each of the five themes of the Digital Service project reporting to the Digital Services Working Group, CMT/SMT and Policy and Resources Committee. As the project progresses and different service areas are in the spotlight it is expected that members of the Project Team and possibly those on the Working Group may change.

#### Benefits

- 3.5 Unlike other projects where the council is in control of costs and savings, Digital Services requires the public to choose to adopt the online service. Therefore, although there is general agreement that Digital Services will deliver savings it is widely accepted that benefits are difficult to predict because it is almost entirely dependent on the successful uptake of these services by members of the public. This highlights the importance of the ease of access to the online services linked to a strong promotion and marketing campaign which will be developed throughout the project.
- 3.6 Using statistics provided within the report to Policy & Resources Committee on 14<sup>th</sup> April 2015 an estimate of the potential savings arising from a 30% shift to Digital Services can be estimated at approximately £250,000 per year. It should be noted these statistics did not include contact between members of the public and schools or other areas not factored into the contact centre approach.
- 3.7 Other benefits will provide opportunities for savings and these will be identified and quantified as the project develops within each customer area. For example electronic forms will remove the need for scanning documents, improve transaction timescales, reduce postage costs, reduce the number of missed appointments and many other opportunities not yet identified.
- 3.8 Although the Digital Services project will deliver efficiency savings, more importantly it will also deliver a platform to enable the council to review the future design and organisation of services. This will require a strategic view of the opportunities, not necessarily delivered directly by the project but as a consequence of it. This has been raised with CMT/SMT as the Board for the project and will be kept under review as the work progresses.
- 3.9 Since approval of the project on 14th April 2015, the majority of work has been in the mobilising phase with the recruitment of key staff and procurement of the underpinning tools and services. Baseline information has been gathered for future performance reporting. However, at this stage changes are in the process of going live and some implementation time is necessary before performance impact can be measured. It is planned to include this in the next monitoring report.

## Channel Shift

### **Website**

- 3.10 A key component of the channel shift theme is an engaging web site providing easily accessible content and services. A revised design was approved by the Digital Services Working Group and CMT/SMT before being re-launched on 12<sup>th</sup> August 2015. Feedback from the public to date on the general redesign has been encouraging with the majority taking time to provide positive feedback.
- 3.11 The Communications Officer recruited to the project has been reviewing existing content to ensure the content better reflects the services under review and better serves the needs of the public when they visit the council web site.
- 3.12 Council house tenants who had previously expressed a willingness to be consulted on future changes have been invited to participate in a survey on the digital services developed for Housing and initial responses have been very positive. Also, the Scottish Housing Regulator who periodically reviews the relevant housing pages on our web site has provided positive feedback after their latest review during week commencing 26 October 2015.

### **Electronic Forms**

- 3.13 An electronic forms solution enables the public and contact centre staff to complete forms online while capturing the data electronically. This provides the opportunity to re-use the data within the council without the need for rekeying into other systems and removes the need to scan the documents that would otherwise have been sent into the council.
- 3.14 The previous electronic forms solution was end of life and therefore no longer supported by the supplier. A replacement solution was procured from Abavus UK in June 2015 and a major advantage of the new solution is the associated mobile application. This mobile app enables all forms presented on the council web site to be similarly presented on the mobile device using the app.
- 3.15 The forms have been initially redeveloped on a like for like basis and the process of making them live continues. Members of the public can now download the app for use on Apple iOS, Android and Windows devices. Examples of services that can be accessed in this way include reporting a road or lighting fault and shortly anti social behaviour and the various forms identified within the first phase of the project in 3.18.

## Customer Groups

- 3.16 An early decision approved by the Digital Services Working Group was to consider the delivery of new solutions by targeting customer groups rather than by traditional council service area. The advantage of this approach is the ability to provide a package of services which maximises the uptake of online services from the customers' point of view.
- 3.17 The first target group was identified as Council House Tenants on the basis of the high quality of data held within the Customer Relationship Management system related to this group of customers. The service representatives seconded to the Project Team have identified a number of opportunities that could be developed for this target group. The list of opportunities is included in **Appendix 4**. The opportunities have been prioritised and work is progressing using the agile delivery methodology to develop and implement the solutions on an iterative basis of 2 week development schedules. Those opportunities requiring a secure personal account will have to be placed on hold until such time as the secure account is available see section 3.23-3.30.
- 3.18 The project team are coming to the end of the 5<sup>th</sup> iteration of developments, or in agile terms the 5<sup>th</sup> "sprint", and they are actively working on or have delivered the following changes:-
- a) Appointment reminders being sent by SMS
  - b) Offer of tenancy by email/SMS
  - c) Logging of council house repairs
  - d) Waiting List enquiry
  - e) Online balance enquiry with a "Pay Now" button
  - f) A repayment plan form that will also link from the balance enquiry
  - g) Changes to the contact centre scripts to inform the caller how to access these solutions online at the end of a call
  - h) Email footers promoting the online services
  - i) Web page changes related to the online services
  - j) Promotion of Scottish Welfare Fund
  - k) Permissions application form
  - l) Garage application form
  - m) Grass cutting application form
  - n) Tenancy succession
  - o) Tenancy termination form
  - p) Lodger application form
  - q) Application for sublet
  - r) Contact with children – proof of bedroom requirements for separated parents
  - s) Mutual exchange application form
  - t) Revenues general enquiry form
- 3.19 The typical benefits identified within the initial target customer group include
- a) Reduction in face to face visits
  - b) Reduction in telephone calls
  - c) Avoiding "no show" appointments

- d) Text/email alerts and reminders
- e) Reduced scanning in the mail room
- f) Reduction in arrears
- g) Increased number of payment plans established
- h) Reduction in postage
- i) Reduction of number on waiting list
- j) Potential reduction in duration of voids
- k) Consistent delivery of service
- l) Open and transparent publication of information relating to housing estate/offers

### **Future Prioritising of Customer Groups**

- 3.20 A total of nine customer groups were identified and consideration given to the potential order for project delivery with the outcome reported to the Digital Services Working Group on 24<sup>th</sup> September 2015 and CMT/SMT on 5<sup>th</sup> October 2015.
- 3.21 To determine the order to deliver against the customer groups a number of factors were considered including transaction volumes, number of users, likely age profile of user groups and quality of existing data. However, regardless of weighting and scoring model there was little difference in the overall result. A recommendation was made to develop the project in the following customer group order.
1. Council Householders
  2. Environmental / Infrastructure
  3. Wider Householder group
  4. Parent / Guardian / Pupil
  5. Social Care Client / Prospective Client
  6. Council / Internal / Other
  7. Leisure
  8. Business / Agents / Organisations / Charities
  9. Visitors / Non Residents
- 3.22 While statistical analysis provides some insight to inform the debate, there are wider considerations around organisational priorities, required outcomes, readiness of services and people, service pressures and issues and general appetite for change that will be influential in determining the order in which work is undertaken. CMT/SMT approved in principle the order of customer groups for delivery of the project but acknowledged that as our knowledge and understanding of the potential benefits of Digital Services develops the order may be reviewed.

## Citizen Account

### **My Account**

- 3.23 A central part of the Moray Council Digital Public Services Framework is the introduction of a registration scheme, allowing customers to create a unique 'Citizen Account' to securely identify and authenticate themselves regardless of how they choose to access council services.
- 3.24 A review of the options for providing a secure personal account was prepared by the Project Team with two high level options considered. The first option identified the potential for designing and developing a solution specifically for Moray Council against the alternative option of adopting the national myAccount solution introduced by the Improvement Service.
- 3.25 The Working Group on 24<sup>th</sup> September 2015 and CMT/SMT on 5<sup>th</sup> October 2015 approved the adoption of the national myAccount solution as the least risk option and discussions are continuing with the Improvement Service regarding the adoption of the scheme with a view to implementing myAccount at the earliest opportunity. Initial plans targeted the implementation of the myAccount solution early in the project but following discussions with the Improvement Service it is likely to be early next year before the myAccount solution can be implemented in Moray.
- 3.26 The myAccount solution will provide the necessary security layer enabling individuals to authenticate themselves when they access services online but it does not on its own provide the customer enquiry or "portal" solution that automatically links the data to our Customer Relationship Management (CRM). Work is ongoing to select a technical solution for a Customer Portal to provide the secure gateway to personalised online services.
- 3.27 The main risk in relation to myAccount is that development is outwith the control of the council but it is a key element of our project as much will depend on an effective and secure customer account. My Account is led by the Improvement Service and development is driven by demand from across its council customer base. However, there is potential to expand the sharing and use of data as participation increases and so it is seen as the best long term option. At present, it is also of note that developments are planned for myAccount to provide for improved authentication of users that would expand its applicability from the current online only to the potential to be used for telephone and face to face contact. This is an important aspect for the Moray project as the aim is to ensure consistency of customer experience across all channels.

### **Data Matching**

- 3.28 Data matching is a necessary activity to be undertaken prior to providing online services. A number of council systems hold data related to individuals but there is no intelligence within these systems providing the confidence that data held relates to the same people. To provide a comprehensive service to

members of the public there is a need to match data between systems where appropriate and relevant.

- 3.29 A data matching approach was documented and approved by the Digital Services Working Group and an exercise to gather customer dates of birth is ongoing, and has collected details for almost 12,000 individuals to date. Following the successful match of Customer data from the Lagan CRM system with the Improvement Service myAccount database, a similar test is being carried out with an extract of Applicants & Tenants from the Housing system. Work to compare contact details from the CRM and Housing systems is complete and reports have been provided to both services with phone numbers and email addresses to be updated.
- 3.30 Processes to support the exchange and maintenance of customer information once formal data matching has taken place and the Citizen Account implemented have also been prepared and considered by the working group. Investigations are taking place into suitable data transfer solutions which will ensure the timely and accurate interchange of data between systems within the council.

#### Data Sharing

- 3.31 As a data controller Moray Council must ensure that all processing of personal data complies with the Data Protection Act. This covers all processing of personal data and is not restricted to the Digital Public Services project. However, the opportunity has been taken to review the Data Privacy Notice informing the public how their personal data will be processed and, with consent, shared across the council and beyond.
- 3.32 The Information Assurance Group and the Digital Services Working Group have approved the revised Data Privacy Notice with the intention to display the notice and inform the public through all customer contact channels including telephone contact centre, access points, leisure centres, community centres and libraries. CMT have also been consulted and have approved the use of the revised statement.

#### Better Use of Data

- 3.33 The Scottish Government Data Management Board published an Open Data strategy in February 2015 which aims to provide a platform for agencies to provide non-personal and non-commercially sensitive data freely available to members of the public. In September 2015 they published a resource pack to support this strategy.
- 3.34 The Digital Services Working Group on 24<sup>th</sup> September 2015 and CMT/SMT on 5<sup>th</sup> October 2015 approved the adoption of the Open Data Strategy and the Project Team continues to review the resource pack to prepare the council for Open Data publication.

- 3.35 An initial list of Open Data opportunities has been prepared by the team which has the potential of reducing the regular Freedom of Information requests received by the Council or alternatively may better inform members of the public. For example, prior to submitting an application for a council house, applicants could view historical data related to availability and allocations to better inform their choices for housing areas.

#### Digital Awareness

- 3.36 Branding the project is seen as critical to raising digital awareness and helping to “sell” the outputs of the project. Consideration is being given to a brand name that captures the essence of the Digital Services project.
- 3.37 The plan is to tackle awareness both internally and externally in an open and transparent manner using the council web site as the main communication vehicle. The process of identifying the relevant information to publish has started and the intention is to publish updates on a regular basis.
- 3.38 Although limited consultation has taken place with the public to date the Communications Officer has identified a number of opportunities to inform and seek feedback from the public. Plans are being developed to undertake rolling consultation work throughout the project.
- 3.39 A series of road shows have been held with the relevant service staff informing them of the forthcoming changes. A similar communications plan will be prepared for consultation and engagement with the public. In particular this will include the need to consult on the deliverables arising from the Chanel Shift theme.

## **4 SUMMARY OF IMPLICATIONS**

### **(a) Moray 2023: A Plan for the Future/Service Plan/Health and Social Care Integration**

Section D of the Council’s Corporate Plan describes “How we will change to meet the challenges” and the fourth of the five sub-headings in this section recognises that “many services across the public sector could be delivered more personally and more efficiently online”.

### **(b) Policy and Legal**

The Digital Public Services project has the customer at the heart of design. This approach and the necessary compliance with the Data Protection Act will ensure consistency with the customer care policy.



**(c) Financial implications**

The following tables summarise the capital and revenue budgets for systems and staffing approved by Policy & Resources Committee on 14<sup>th</sup> April 2015 and expenditure in the current financial year.

<b>Capital</b>	2015/16	2016/17	2017/18
Budget	£50,000	£500,000	£50,000
Actual	£45,000	0	0
Balance	£5,000	£500,000	£50,000

<b>Revenue Systems</b>	2015/16	2016/17	2017/18
Budget	£25,000	£99,500	£110,000
Actual	£7,600	0	0
Balance	£17,400	£99,500	£110,000

<b>Revenue Staffing</b>	2015/16	2016/17	2017/18
Budget	£360,800	£360,800	£360,800
Actual	£31,800	0	0
Balance	£329,000	£360,800	£360,800

Capital

The majority of planned spend is complete however it should be noted that ongoing discussions with the Improvement Service and other suppliers could present opportunities to develop the online services solutions quicker and this could result in a requirement to draw down funds earlier than originally anticipated.

Revenue

The systems revenue budget is currently on target but opportunities identified under capital may result in a similar requirement within the systems revenue budget.

The relatively light spend in the staffing revenue budget is a result of the recruitment process concluding in August resulting in a lower level of expenditure in the current financial year.

Benefits

As identified in Section 3.5-3.9 above benefits will be determined and reported upwards throughout the delivery of the project.

**(d) Risk Implications**

A risk register is being maintained for the project with major risks reported on a regular basis to the Digital Services Working Group. A number of risks are reflected in the body of this report, for example

customer uptake of services, appetite for service change, and in relation to myAccount.

**(e) Staffing Implications**

Additional staff have been recruited to the project team including Project Leader, additional ICT staff and a Communications Officer.

With phase 1 of the project focussing on the Council Householder customer group, Staff from Housing and Property Services and Revenues/Customer Services have been seconded onto the project team. It is anticipated that resourcing requirements will vary as different customer groups are targeted for project delivery within the project.

**(f) Property**

Additional staff have been accommodated within the existing provision and this approach should continue throughout the project.

**(g) Equalities**

The Digital Public Services project will enhance existing service provision by introducing an additional online service delivery channel. The intention to design services around the needs of the customer and involve them in the process should avoid any equalities issues arising from this project.

**(h) Consultations**

The Digital Services Working Group has been consulted in the development of these proposals and comments have been incorporated into the proposals and decisions moving the project forward.

**5. CONCLUSION**

**5.1 The Digital Services project is now in full operation with all staff recruited and the project team actively working on all themes of the project. An agile approach to project delivery is in place and the project team will iteratively prioritise the deliverables providing the opportunity to deliver on time and maximise benefits at the earliest opportunity for the council.**

**5.2 The governance arrangements identified above are designed to ensure the agile methodology can succeed by empowering the team to make day to day decisions on behalf of the council. The project communications plan will provide regular progress reports for all stakeholders and the opportunity for review.**

- 5.3 The priority of customer groups is an important element for the direction and delivery of the project. In keeping with the agile approach it is proposed both the costs and the benefits will be reviewed in an iterative manner and reported for consideration.**

Author of Report: Phil McDonald, ICT Manager

Background Papers: P&R Report 14 April 2015

Ref: