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**IMPROVEMENT SCRUTINY  
COMMITTEE**

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**Scrutiny Review of the Impact of  
Welfare Reform and Wider Issues on  
the Contact Centres**

**August 2014**

## **Contents**

Chair's Foreword

1. Introduction
2. Recommendations
3. Scope of review
4. Method of review
5. Evidence
6. Key findings
7. Conclusions

Appendix 1	Stakeholders engaged during the review
Appendix 2	Data Analysis: Questionnaire for Contact Centre Customers
Appendix 3	Data Analysis: Questionnaire for Partners / Agencies
Appendix 4	Data Analysis: Questionnaire for Local Authorities

## **Foreword of Councillor Hilary Gilmour Chair of the Improvement Scrutiny Committee**

On behalf of the Improvement Scrutiny Committee it is a pleasure to present this review report, The Impact on Customer Services due to Welfare Reform and Wider Issues.

The review was carried out one year after the implementation of Welfare Reforms.

Welfare Reforms and other issues have had a major impact on customer service delivery with all four Contact Centres experiencing high volumes of customers with complex and diverse needs.

Members' observations were that the pressures experienced will continue to increase as Welfare Reforms continues to impact on our customers through the implementation of Universal Credit.

The recommendations made in this report will help to relieve some of the pressures that the Contact Centre Managers and their teams experience whilst maintaining an excellent quality service for our customers.

I wish to take this opportunity to thank Alison Donohoe - Customer Services Manager and Contact Centre Managers and their staff for all their time and effort to provide us with information for this review. I would also like to thank officers and the many agencies and partners who took the time to contribute to this review.

Many thanks to Lynne Cheong, acting Scrutiny Officer and Abby Brownsword, Governance Officer for their dedicated hard work and commitment to this review and finally a sincere thank you to the Members of the Improvement Scrutiny Committee for their perseverance and dedication, committing to extra meetings in order to meet the deadline for this review.

### **1. Introduction**

The Improvement Scrutiny Committee selected the topic for its review at the Annual Scrutiny Conference in April 2014 having noted that demands on Customer Services had increased substantially due to welfare reform and other issues.

In addition to the data in Appendix 5, other recent data from the Contact Centre service shows that:

- 5,000 more verification procedures for housing benefit claims were handled in 2013/14 than in previous years with an estimated further increase of 3000 in 2014/15.
- Debit card payments – in 2013/14 over 10,000 payments were made on the Council's automated telephone payment line; 12,472 internet payments; 12,786 payments to customer advisors by telephone; and over 17,000 face to face debit card payments to the cash desk.

- In 2013-14, the service received 4,648 corporate e-mail enquiries and in the 1<sup>st</sup> quarter of 2014/15, it received 1,702 which is a huge increase. The service took over responsibility for this area of work in 2013. It responds to each enquiry, monitors progress on each case and chases up any departmental responses, to enable reporting on the Council's Customer Service Standards. With channel shift forming a key part of service transformation at the Council, it may be anticipated that this method of contact will continue to increase.
- In 2013/14 the service received 85,364 telephone calls which is an increase of 2,214 compared to 2012/13.
- In 2013/14 the service handled 74,478 face to face enquiries which is an increase of 1,678 compared to 2012/13.
- In 2013/14 the service processed 118,316 payments which is an increase of 13,934 compared to 2012/13.

	<b>2012/13</b>	<b>2013/14</b>	<b>increase</b>
Tel calls received	83150	85364	2214
Face to Face	72800	74478	1678
E-mail	0	4648	4648
Payments	112923	118316	5393
<b>Total</b>	<b>268873</b>	<b>282807</b>	<b>13934</b>

The table below gives estimates of the numbers in the District –both in work and not working - who are affected by welfare reforms.

<b>Benefit</b>	<b>Estimated no. of claimants affected</b>
Housing Benefit: Local Housing Allowance	1800
Housing Benefit: Under-occupation ('bedroom tax')	700
Non-dependant deductions	400
Household benefit cap	30
Council Tax Benefit	4500
Disability Living Allowance	1000
Incapacity benefits	2600
Child Benefit	9600
Tax Credits	6600

Source: Centre for Regional Economic & Social Research, 2013

Bolsover District has a diverse range of customers who access the Contact Centres on a regular basis for services and support. These needs include disabled, elderly, vulnerable adults, mental health issues, domestic violence, young people with no life skills, ethnic minorities and single parents.

## **2. Recommendations**

The Improvement Scrutiny Committee makes the following recommendations:

**2.1 That two full time Customer Advisor posts are created and permanently placed on the establishment from April 2015.**

The Customer Services Manager reported that there were five temporary members of staff, four of which worked on Meet and Greet and on cash restricted duties (scale 4) and one member of staff was a Customer Advisor (part time – 23 hours 15 minutes) (scale 5).

The number of customers contacting the Council has increased substantively since the implementation of the government's programme of welfare reforms.

Face to face contact can take up to 25 minutes per enquiry. During the review, Members observed evidence to suggest that people can be queuing for over an hour to be seen on busy days.

The Contact Centre service has experienced a shortfall in fully trained Customer Advisor roles which is impacting on some aspects of its performance. It has historically proved difficult to recruit to temporary roles, due to little interest in short term contracts from suitable potential employees. Those employed in temporary roles as Meet and Greet staff could not be deployed into Customer Advisor roles at busy times as the training needs for the latter were of approximately nine months duration.

The length of time necessary for training was in part due to the complex nature of the Council as an organisation and understanding the differing roles and responsibilities within services in order to direct customers to the appropriate place. Other factors included staying informed about changes in policy and legislation as well as any external changes, for example within local partner agencies. The Meet and Greet roles required approximately four months training as the duties were very different.

The Committee was advised that the creation of two additional Customer Advisor posts would require a budget extension of between £46,362.00 and £51,280.00 and it was felt that this could be funded using the underspend on the General Fund in order to continue to deliver the agreed level of service to local residents.

**2.2.1 That the current quarterly half day closing arrangements for staff training sessions are maintained to ensure that staff remain on top of the changing landscape of Welfare Reforms and maintain the high levels of customer service currently delivered.**

A quarterly Wednesday afternoon half day training session has proved beneficial for staff and their personal development, notably through increasing morale, confidence, sharing knowledge about complex benefit and other changes; inviting advice agencies into the training sessions to develop best practice; identifying new agencies for signposting; and developing practical solutions to emerging issues. An example of the latter was a staff suggestion for a checklist for documentation relating to Choice Based Lettings, which has been implemented.

Performance monitoring information evidences that there has been neither a decrease in customer satisfaction levels nor any significant increase in complaints as a result of the half day closure of the four Contact Centres for staff training. However, there had been an increase in customer compliments.

Comments received from staff showed that it was valuable to move away from the usual work area and meet up with colleagues from other Contact Centres as well as the Customer Advisors felt like they were providing a better quality service to our customers particularly in relation to understanding Mental Health Issues which had been included within the training sessions over the past year.

Further dates have been scheduled for the remainder of 2014/15 and the quarterly training should continue through 2015 and onwards.

**2.2.2 That any additional training with new voluntary partnerships for Contact Centre staff are considered a priority e.g. SAFFA, CISWO, Sign Language. These needs may be identified by customer feedback, as well as by staff.**

The Committee was surprised at the sheer volume of contacts handled and impressed by the innovative ways in which the Contact Centres have responded to complex customer needs arising from welfare reforms. Members particularly noted the ongoing partnership work with local agencies such as food banks, advice services and specialist services for ex-services and miners, as well as financial inclusion projects such as credit unions and debt management support. The on-line information kiosk provided by NEDCAB at The Arc, Clowne, is a good example of how joined up approaches can benefit customers. Staff training has also played an important role in supporting innovative good practice and building capacity to identify and respond to issues such as mental health and autism when dealing with customers.

**2.3 The Committee endorses the Portfolio Holder and Customer Contact Service Manager's support for investigating the possibility of a move to automated payment methods.**

The Customer Services Manager advises that this option is being considered as part of the wider review of Customer Services which will be picked up through that process and if approved, will be subject to a full business case. Such a system would provide an opportunity for out of hours customer service at The Arc, Clowne and The Hub, South Normanton where the buildings are open outside of Contact Centre opening times.

**2.4.1 That the Authority continues to provide Contact Centres in the four current locations.**

There is a continuing need for Contact Centre premises in each of the four current locations, as the four areas have very different customer needs, as evidenced in the analysis of customer questionnaires and Members experiences.

Due to the rural nature of the District and a lack of main bus routes, it is difficult for customers who do not drive to travel from one area of the district to another. The four Contact Centres are conveniently located in the four main town centres of the District which means that the majority of the District's residents are able to access face-to-face and cash desk services within the local area.

Carrying out this review has highlighted the variety of services and support available to our customers who often visit the Contact Centres with diverse and complex needs. It was reported that the personal service on offer at the local Contact Centres has often resulted in identifying other issues that the Customer Advisors have been able to assist with and resolve.

Contact Centre Managers and Customer Advisors get to know customers in the local area they serve and this knowledge and expertise is valuable in delivering a quality service to local people. One of the recommendations from the Customer Excellence Assessment is to consider implementing monitoring of the quality of service delivered.

**2.4.2 That consideration be given to the Contact Centre at Shirebrook being relocated in new premises as a matter of urgency, bringing Shirebrook up to the standard of the other Contact Centres.**

The relocation of Shirebrook Contact Centre has been a longstanding issue with customers, staff and Elected Members. Concerns regarding the size of the building and floor space for both customers and staff have been raised at the Authority's Safety Committee and Strategic Alliance Management Team.

**2.4.3 That the potential use of a language volunteer and the demand for such a service at the Shirebrook Contact Centre be investigated.**

Shirebrook has a polish community and in order to assist people some Customer Advisors have learnt basic polish to adapt to customer need. However, having a volunteer fluent in Polish would ensure that all customers receive the same level of service.

It has now been established that there are a couple of volunteers currently working out of the Christian Aid Centre. The Customer Services Manager is attending a meeting in September 2014 to discuss signposting and options for utilising this facility.

It was also noted that 'Language is everything' provided a useful telephone translation service.

**2.4.4 That the Authority considers how privacy can be improved in all four Contact Centres.**

Comments were received from customers about the level of privacy at the windows when dealing with a Customer Advisor.

Although the Contact Centres have a notice advising Customers that they can request a private interview room to deal with their enquiry, most customers felt that this would add to their waiting time.

**2.5 That the Revenues Service, where possible, take account of Bank Holidays and other issues when sending mass mail outs, to avoid additional pressure on both customers and the Contact Centres.**

The Revenues Manager had advised that while there was no corporate policy on the timing of mail out items such as council tax summonses, the Council was obliged to issue notices in line with legal notice periods and with predetermined court hearing dates, over which the Authority has no control. The Revenues Service shares this information with the Contact Centres to enable them to plan for an anticipated increase in customer contacts.

### **3. Scope of Review**

The aims of the Review were:

- To consider the effects of delivery of customer services within the context of Welfare Reform
- To consider the resilience of the Contact Centres in the response to change from Welfare Reform.



The objective was:

- To ensure that our communities are receiving the most efficient service that Bolsover District Council can provide bearing in mind the changes brought about through Welfare Reform.

The Committee comprised the following Members:

Councillor Hilary Gilmour	Councillor Jim Smith
Councillor Pauline Bowmer	Councillor Ray Brooks
Councillor Jim Clifton	Councillor Paul Cooper
Councillor Malcolm Crane	Councillor Ray Heffer
Councillor Duncan McGregor	Councillor Rita Turner

#### **4. Method of Review**

Several methods were used to gain insight into key issues from officers and customers and to benchmark our approach with that of neighbouring authorities, which then informed the Committee's Review.

The methods used were:

- Interviewing
- Site visits to Contact Centres using questionnaires for customers
- Questionnaire to advice agencies
- Questionnaire to other local authorities to benchmark for good practice

Documentary evidence:

- Any Bolsover District Council policy on mail out of council tax and rent arrears
- Timing of summonses
- Contact Centre scripts
- Statistical data: District profiles and customer insight information
- Contact Centre Performance management information from PERFORM

#### **5. Evidence**

The Customer Services Manager provided a detailed overview of the day to day operational issues affecting the Contact Centres, as resources needed to be redeployed to meet varied demands.

To gain an understanding of how Firmstep works in practice, Members were shown sample scripts used by Contact Centre staff which act as prompts when dealing with enquiries. These incorporated a wealth of information to support signposting of customers to relevant internal and external sources of advice, information and support.

## 6. Key Findings

- The Contact Centres provide support to all departments across the authority.
- The scale of welfare reforms is beginning to be felt across the District and with more changes to come in the future such as the transition to Universal Credit, demand from customers who are affected is likely to increase.
- Staffing issues have impacted on the resilience of frontline Customer Services in coping with rising demand arising from welfare reforms and other issues. This in turn has led to queues at peak times and longer customer waiting times as Customer Advisors are dealing with processes and complex issues which take longer to complete or resolve.
- Mail outs by the Revenues service prior to Bank Holidays have also led to increased demand when the Council offices have reopened. Members felt that this potentially increased anxiety for some vulnerable customers.
- Channel shift is transforming service delivery with its potential to free up human resources through technological solutions. For example, Firmstep, the new Customer Information System, will enable customers to report and track progress on dealing with problems on-line and a proposed automated payment system will provide an additional out of hours payment method. Nevertheless, the authority must continue to support face to face and other access by those customers with more complex needs, particularly disabled people, older people and those who do not have access to the internet.
- In addition to the Polish Community in Shirebrook, Customer Advisors reported that there were more requests being received for Lithuanian interpretation and the new language service facility – Language for Everyone was being used for these requests. The use and expense of this facility will need to be monitored in the coming months.
- During the site visits a suggestion was made by a customer that the Authority considered trialing a ticketing system to allocate places in queues. Members have been advised that this option has been explored on a number of occasions and has been found not to be cost effective for the volume of customers involved and also the size of the waiting areas do not justify such a system.
- The Improvement Scrutiny Committee will continue to monitor the development of Firmstep through the annual work plan.

## **7. Conclusions**

The Committee has considered the evidence and concluded that staffing levels in the Contact Centres have impacted on the service's capacity to respond to increased customer contacts and maintain any relevant Customer Service Standards, which are key to the Council's achievement of the Customer Service Excellence standard.

Transformation of its services is a Council priority and will benefit many customers in the future as more customer services go on-line; however, this channel shift will take time to embed. In addition, there will always be customers who need more support to access our services as well as those who for various reasons prefer to visit their local Contact Centre.

Local Contact Centres are able to tailor their services to meet local needs, so the potential use of a Polish speaking volunteer for drop in sessions in Shirebrook is a welcome development. The Committee was concerned that the premises at Shirebrook are not of the same high standard as newer premises at Clowne and South Normanton; the new premises at Bolsover have yet to be completed. Members also observed during their on-site visits that there are privacy issues in each Contact Centre and that some customers struggle to stand in queues.

The Committee believes that its recommendations will help make the Contact Centre service more effective and increase efficiency.

## Appendix 1

### Stakeholders

Councillor Rose Bowler -	Portfolio Holder, Customer Services
Paul Hackett -	Executive Director - Transformation
Jane Foley -	Assistant Director – Customer Service and Improvement
Alison Donohoe -	Customer Services Manager
Sarah Smith -	Contact Centre Manager
Josie Woods -	Customer Advisor
Jane Lappins- Partnerships Team	Billing and Recovery Manager

#### Partners / Agencies

2 Shires Credit Union  
Age UK  
Derbyshire Law Centre  
Derbyshire Unemployed Workers Centre  
NEDCAB  
Release

#### Local Authorities

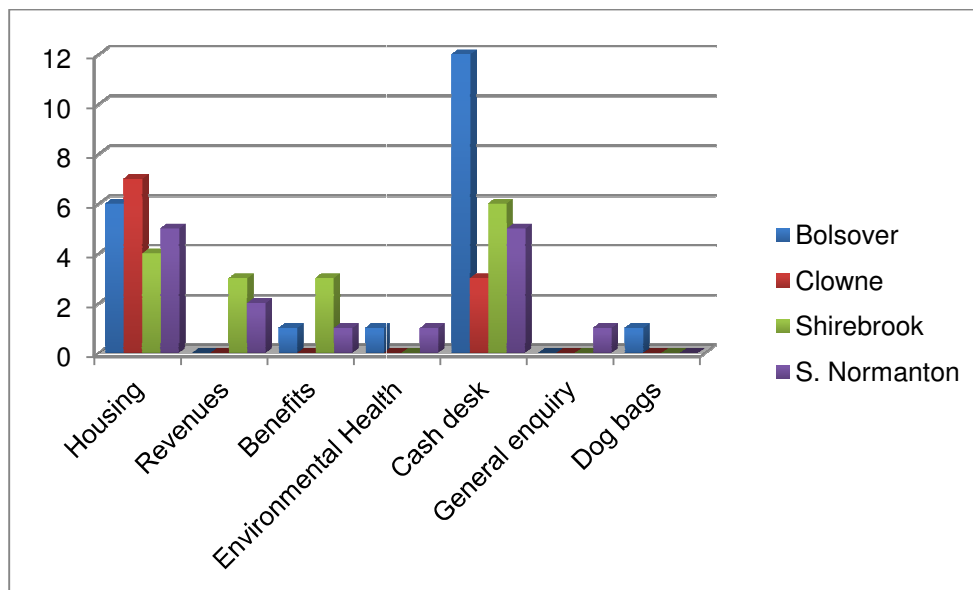
Amber Valley District Council  
Chesterfield Borough Council  
Derby City Council  
North East Derbyshire District Council

## Appendix 2

### Data Analysis: Questionnaire for Contact Centre Customers

#### 1. What is the nature of your enquiry today?

Service	Bolsover	Clowne	Shirebrook	S. Normanton	Total
Housing	6	7	4	5	22
Revenues	-	-	3	2	5
Benefits	1	-	3	1	5
Licensing	-	-	-	-	0
Street Services	-	-	-	-	0
Planning	-	-	-	-	0
Environmental Health	1	-	-	1	2
Cash desk	12	3	6	5	26
Credit Union payment	-	-	-	-	0
General enquiry	-	-	-	1	1
Dog bags	1	-	-	-	1



#### 1.a. How often do you visit the Contact Centre?

Time interval	Bolsover	Clowne	Shirebrook	S. Normanton	Total
Weekly	10	3	2	5	20
Monthly	3	3	5	5	16
Quarterly	-	3	-	1	4
Once a year	-	-	-	-	0

<b>Time interval</b>	<b>Bolsover</b>	<b>Clowne</b>	<b>Shirebrook</b>	<b>S. Normanton</b>	<b>Total</b>
Occasionally	7	1	-	3	11

**1.b. What time do you usually call at the Contact Centre?**

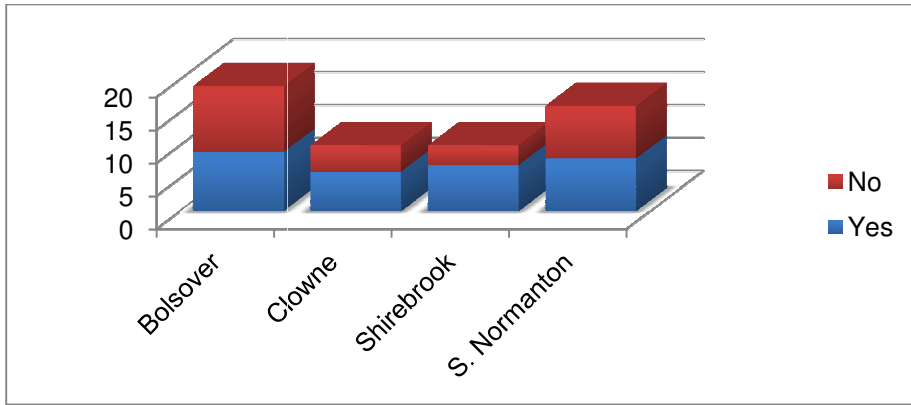
<b>Time / day</b>	<b>Bolsover</b>	<b>Clowne</b>	<b>Shirebrook</b>	<b>S. Normanton</b>	<b>Total</b>
Morning	11	2	1	6	24
Afternoon	1	1	-	1	3
Any time	6	7	7	-	20
Monday	5	2	2	5	14
Tuesday	1	1	-	-	2
Wednesday	-	1	-	1	2
Thursday	-	1	-	1	2
Friday	-	-	1	-	1
Any day	7	3	3	5	18

**2. How long do you think is a reasonable time to wait to see an advisor?**

<b>Reasonable waiting time</b>	<b>Bolsover</b>	<b>Clowne</b>	<b>Shirebrook</b>	<b>S. Normanton</b>	<b>Total</b>
5-10 minutes	6	2	4	9	21
10-15 minutes	4	1	3	5	13
15-20 minutes	4	-	3	1	8
20-30 minutes	2	1	-	-	3

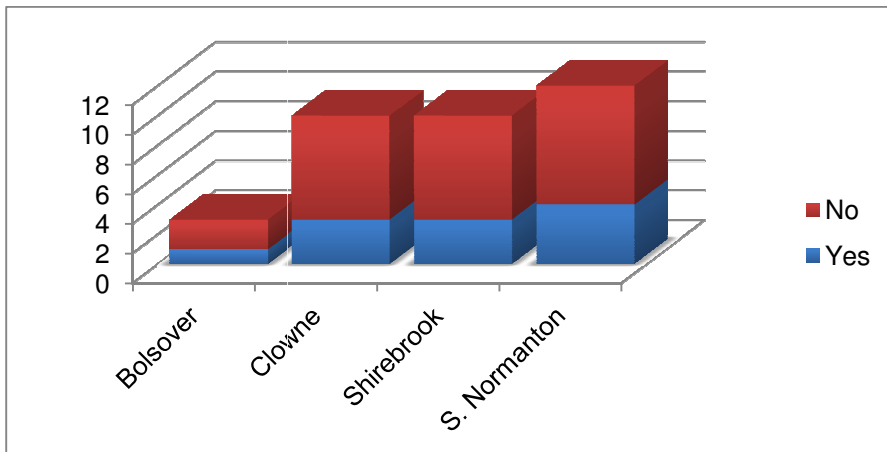
**2.a Do you have a computer, smart phone or other mobile device (eg: tablet, ipad) with an internet connection?**

	<b>Bolsover</b>	<b>Clowne</b>	<b>Shirebrook</b>	<b>S. Normanton</b>	<b>Total</b>
Yes	9	6	7	8	30
No	10	4	3	8	25



**2.b. Do you know about / use our on-line services (eg: to report a missed bin)?**

	Bolsover	Clowne	Shirebrook	S. Normanton	Total
Yes	1	3	3	4	11
No	2	7	7	8	24



## Appendix 3

### Data Analysis: Questionnaire for Partners / Agencies

1. Has your agency received any client referrals for advice, support or information from local councils?

Yes	4
No	1
No response	2

- 1.a. If yes, how many referrals were made in the following years?

2012-2013	2013-2014
15	30

2. Has your agency received any referrals from Bolsover District Council?

Yes	4
No	1
No response	1

- 2.a. If yes, how many referrals were made in the following years?

2012-2013	2013-2014
3	14

3. Has there been a significant increase in demand for your service due to welfare reforms or wider issues?

Yes	4
No	1
No response	1

4. What has been the route for individuals assisted?

*Callers who contact the Law Centre via: email, telephone, website or calling into the main office or at one of the branch offices receive a diagnostic assessment from our Assessment Team.*

*If their enquiry falls within one of our specialist areas of law (debt, discrimination, employment, homelessness, housing and tackling hate and harassment) then we would follow this up with an appointment to see a solicitor or a caseworker. Otherwise they are referred to a most appropriate advice agency or be given self-assisted information.*

*Individuals come to us via a number of sources as well as the Council including other partners, our own marketing activities and recommendations from family and friends*



**5. How many individuals have you assisted in accessing the Council's Discretionary Housing Payments fund?**

<b>Total no. assisted</b>	17
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**6. Are you aware that the Council's Customer Advisors are now trained to better identify and respond to the needs of customers as individuals?**

<b>Yes</b>	4
<b>No</b>	1

**6.a. Can you identify any positive benefits for your agency from our more holistic approach to individual needs?**

<b>Positive comment</b>	3
<b>Negative comment</b>	0

*We are pleased to see that customer advisers at Contact Centres are providing holistic services – analysing the key issues and responding to each issue by making the most appropriate referral on each matter.*

*Some people accessing services that previously probably would not. A person contact with the council maybe the only or main opportunity to encourage a person to obtain additional support.*

*It enables individuals to be referred to the most appropriate agency*

**6.b. Can you suggest any ways to improve our service?**

*Keep reminding and encouraging front-line staff that when dealing with people they very often have a multiplicity of issues and not to bury their heads but get support. It would be good to ask that person the next time (if it happens) they see them, e.g at a Contact Centre counter. How they got on at ..... agency, etc – relationship and trust building.*

*This will help spread the word by people's recommendations/talk, etc. that free advice and support is available.*

*Annual checks on referrals made to advice agencies – this will give us the opportunity to work in partnership and look at ways of improving referral rates.*

*No. We work closely with various departments with Bolsover DC.*

## Appendix 3

### Data Analysis: Questionnaire for Local Authorities

The questionnaire was sent to ten local authorities, five of which responded. Follow up calls / email contacts were made to encourage more responses.

**1. Has there been a significant increase in demand for your customer services due to welfare reforms or wider issues?**

<b>Yes</b>	4
<b>No</b>	1
<b>No response</b>	0

One authority commented that there had been an initial increase resulting from more complex enquiries around the under-occupancy rule.

Another noted a 10% increase in customer contacts (visits and telephone calls) to Revenues mainly due to a combination of queries and recovery following changes to Council Tax benefit.

**2. What changes have you made, if any to deliver your customer services? For example: staff training, channel shift, script changes, more web-based information.**

Staff training sessions	Lessons learned
Explaining new system at time of customer contact	Essential
Prioritised encouraging those affected to set up a payment plan, to mitigate against any later recovery action	Most customers now on weekly / fortnightly payment plan, to help with budgeting
Joint work with housing provider to offer money advice and help with DHP applications	Money advice available to all, not just tenants
Welfare Reform Board set up to ensure the welfare reform agenda is communicated and addressed	
Updating communications to all customers, stakeholders, third sector organizations, elected Members	More information is available to customers on the web
Channel shift	DHP applications now completed on-line
Review of DHP policy and procedures	
Creation of Local Assistance Scheme, to replace Crisis Loans / Community Care Grants	

Presentation to representatives from service areas and external partners (Housing associations, CAB, NHS, social services, local groups, Jobcentre and Credit Union)	
Scripts to assist with customer enquiries, links to documents detailing Housing and Council Tax benefit changes	
Welfare Reform Project Group set up	
Training for Customer service staff on welfare reform	
Customer service proposal strategy for channel shift	

**2.a. Have you sought customer feedback on these changes?**

<b>Yes</b>	1
<b>No</b>	4
<b>No response</b>	0

**2.b. If yes, what methods of customer engagement have you used? For example: customer service events, questionnaires, touchscreen or other satisfaction measures, Tenants and Residents Associations.**

Consultations with RSLs, third sector, frontline staff and internal teams to ensure lessons are learnt from activities done last year and that communications / outreach work is more effective this year
Feedback from Jobcentre, general feedback via comment collected within customer services team

**2.c. Can you identify any benefits for your authority from a more holistic approach to individual customer needs?**

Customers are encouraged to prepare for Universal Credit by being supported to get on-line to claim Council services
Preparing for Local Support Services Framework has meant that we have forged stronger links with third sector organisations, to facilitate better signposting to appropriate services
Housing service put together a pack for tenants to encourage mutual exchange and to prepare residents for the changes. This has kept rent arrears to a minimum
530 individuals signed up to a Credit Union

**3. How many individuals have been assisted to access your Discretionary Housing Payments fund?**

<b>2013-2014</b>	2085
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One authority did not specify the numbers accessing DHP but noted that 98% of their DHP funds had been allocated.

Another authority has allocated 27% of their DHP funds based on size criteria.