
Report of the Head of Governance and Scrutiny Support and Director of Communities and Environment

Report to Scrutiny Board (Environment, Housing and Communities)

Date: 5 March 2020

Subject: Reducing Repeat Customer Contacts through Tackling Failure Demand – Tracking of scrutiny recommendations/desired outcomes

Are specific electoral Wards affected? If relevant, name(s) of Ward(s):	☐ Yes	☒ No
Are there implications for equality and diversity and cohesion and integration?	☐ Yes	☒ No
Is the decision eligible for Call-In?	☐ Yes	☒ No
Does the report contain confidential or exempt information? If relevant, Access to Information Procedure Rule number: Appendix number:	☐ Yes	☒ No

Summary of main issues

1. This report sets out the progress made in responding to the recommendations arising from the Scrutiny inquiry into Reducing Repeat Customer Contacts through Tackling Failure Demand.
2. Scrutiny Boards are encouraged to clearly identify desired outcomes linked to their recommendations to show the added value Scrutiny brings. As such, it is important for the Scrutiny Board to also consider whether its recommendations are still relevant in terms of achieving the associated desired outcomes.
3. The Scrutiny recommendation tracking system allows the Scrutiny Board to consider the position status of its recommendations in terms of their on-going relevance and the progress made in implementing the recommendations based on a standard set of criteria. The Board will then be able to take further action as appropriate.

Recommendations

4. Members are asked to:
 - Agree those recommendations which no longer require monitoring;
 - Identify any recommendations where progress is unsatisfactory and determine the action the Board wishes to take as a result.

1 Purpose of this report

- 1.1 This report sets out the progress made in responding to the recommendations arising from the Scrutiny inquiry into Reducing Repeat Customer Contacts through Tackling Failure Demand

2 Background information

- 2.1 In 2016/17, The Scrutiny Board (Citizens and Communities) conducted an inquiry into reducing repeat customer contact through tackling failure demand. This inquiry concluded in March 2017 and a report setting out the Scrutiny Board's findings and recommendations was published in April 2017.
- 2.3. In July 2017, the Scrutiny Board received a formal response to the recommendations arising from this review. A further update was provided to the Board in March 2019. Updates from both meetings are reflected in Appendix 2.

3 Main issues

- 3.1 Scrutiny Boards are encouraged to clearly identify desired outcomes linked to their recommendations to show the added value Scrutiny brings. As such, it is important for the Scrutiny Board to also consider whether its recommendations are still relevant in terms of achieving the associated desired outcomes.
- 3.2 The Scrutiny recommendation tracking system allows the Scrutiny Board to consider the position status of its recommendations in terms of their on-going relevance and the progress made in implementing the recommendations based on a standard set of criteria. The Board will then be able to take further action as appropriate.
- 3.3 This standard set of criteria is presented in the form of a flow chart at Appendix 1. The questions in the flow chart should help to decide whether a recommendation has been completed, and if not whether further action is required.
- 3.4 The Board is asked to determine a position status for each recommendation. Details of progress against each recommendation are set out within the table at Appendix 2.

4 Corporate Considerations

4.1 Consultation and Engagement

- 4.1.1 Where internal or external consultation processes have been undertaken with regard to responding to the Scrutiny Board's recommendations, details of any such consultation will be referenced against the relevant recommendation within the table at Appendix 2.

4.2 Equality and Diversity / Cohesion and Integration

- 4.2.1 Where consideration has been given to the impact on equality areas, as defined in the Council's Equality and Diversity Scheme, this will be referenced against the relevant recommendation within the table at Appendix 2.

4.3 Council Policies and City Priorities

- 4.3.1 During the original inquiry and in subsequent update discussions, the Scrutiny Board has acknowledged the importance of continuing efforts to become an efficient and

enterprising organisation, in line with Best Council ambitions, particularly within the very challenging context of reduced central Government funding and increasing demand-led cost pressures.

- 4.3.2 In its original inquiry the Scrutiny Board highlighted the importance of ‘getting the basics right’ as the Council seeks to continue to deliver and commission good quality public services; keep to budgets and deadlines; maintain assets effectively; and streamline internal processes and systems. These have remained areas of interest to the Board.

Climate Emergency

- 4.3.3 When considering changing ways of working, the Board is reminded that climate change and sustainability should be a key area of focus.

4.4 Resources and Value for Money

- 4.4.1 Details of any significant resource and financial implications linked to the Scrutiny recommendations will be referenced against the relevant recommendation within the table at Appendix 2.

4.5 Legal Implications, Access to Information and Call In

- 4.5.1 This report does not contain any exempt or confidential information.

4.6 Risk Management

- 4.6.1 This section is not relevant to this report.

5 Conclusions

- 5.1 The Scrutiny recommendation tracking system allows the Scrutiny Board to consider the position status of its recommendations in terms of their on-going relevance and the progress made in implementing the recommendations based on a standard set of criteria. This report sets out the progress made in responding to the recommendations arising from the Scrutiny inquiry Reducing Repeat Customer Contacts through Tackling Failure Demand.

6 Recommendations

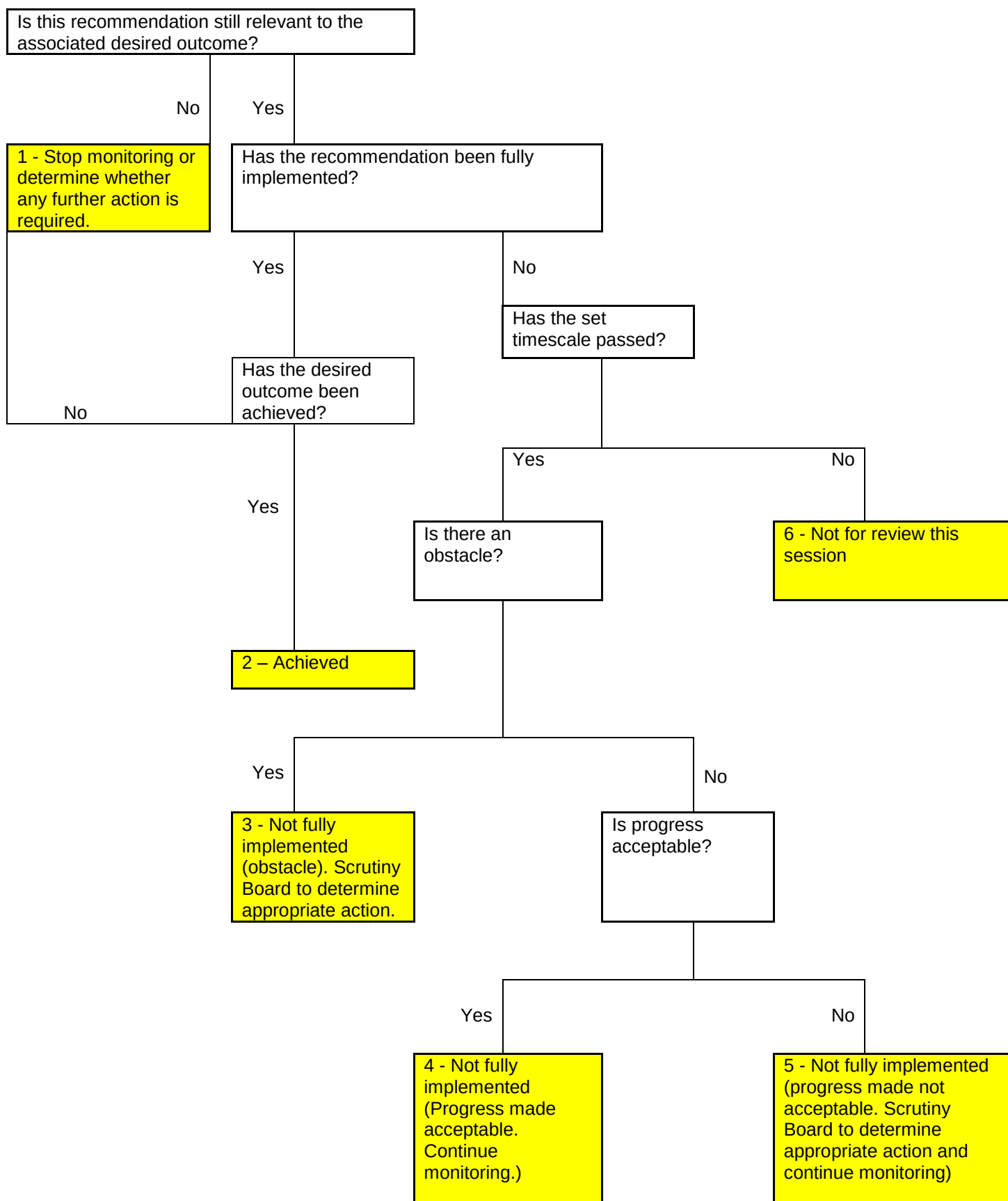
- 6.1 Members are asked to:
- Agree those recommendations which no longer require monitoring;
 - Identify any recommendations where progress is unsatisfactory and determine the action the Board wishes to take as a result.

7 Background documents¹

- 7.1 None.

¹ The background documents listed in this section are available to download from the Council’s website, unless they contain confidential or exempt information. The list of background documents does not include published works.

Recommendation tracking flowchart and classifications:
Questions to be considered by Scrutiny Boards



Position Status Categories

- 1 - Stop monitoring or determine whether any further action is required
- 2 - Achieved
- 3 - Not fully implemented (Obstacle)
- 4 - Not fully implemented (Progress made acceptable. Continue monitoring)
- 5 - Not fully implemented (Progress made not acceptable. Continue monitoring)
- 6 - Not for review this session

Desired Outcome – That an effective process is developed to ensure that customers receive the right housing repair work first time.

Recommendation 1 – That the Director of Communities and Environment engages with Scrutiny on the findings arising from the co-location pilot scheme involving housing repair specialist staff at the Contact Centre and in determining longer term options for ensuring that customers obtain the right housing repair work done first time.

Formal response:

- The initial three month period for the co-location pilot scheme has been extended for a further three months. There has already been a reduction in work queues to responsive repairs as CSOs are able to access specialist advice and service updates while the customer is still on the phone.
- A plan is in place to train CSOs in booking damp inspections, which are currently the biggest single reason for a CSO contacting responsive repairs. The customer will get the correct appointment (either a repair or an inspection) at first point of contact and there will be less follow up work for responsive repairs.
- Work is underway with Mears looking at the high number of repairs booked with incorrect SOR codes and how this can be improved through a mixture of better diagnostics by CSO (see below) and correct codes accessible in Orchard.
- Officers from Customer Services and Officers from Responsive Repairs are meeting regularly to improve the repairs guidance in the workbook. Move from team/ council focused to customer/diagnostic focused.

Previous Update:

The initial co-location pilot came to an end after the co- located staff from the repairs team had rolled out a programme of training. The training has better equipped CSO's to field complex and damp related repairs and book technical inspections directly without relying on passing on referrals to another team. This approach has led to a reduction in 'pass on's' with the overwhelming majority of repairs flowing through the contact centre being booked in with a repair operative or for the more complex repairs, a pre-inspection booked at the first point of contact. Prior to this, all requests for technical pre-inspections were work queued to the repairs team meaning an unnecessary layer of contact.

A citywide review of SOR codes is underway and nearing conclusion. This will lead to a simplified and consistent way of raising orders to both Mears and Leeds Building Services. The purpose of the review is to ensure a comprehensive and accurate list of task codes for front line staff to select when raising orders which will in turn improve the accuracy of repairs raised. This will also ensure an accurate allocation of time is allocated to the operative for them to complete the allocated task. The review is also running alongside a review of the diagnostic software which is used by all frontline order raising staff. This review will ensure that the right questions are asked during the order raising process and that staff have an easy to use tool for selecting and ordering the correct task code relating to the reported repair.

As part of the replacement of the current repairs order raising systems; Housing Leeds are exploring ways of introducing more innovative repair reporting means for tenants including enabling tenants to self-order basic repairs through an online portal and submit photographs and video media in order to more accurately establish causation and therefore improve diagnosis and right first time levels.

Current Update – Feb 2020

Following the initial co-location activity, Housing Leeds now provide a rolling programme of training to all repair ordering staff across different customer outlets to ensure consistent standards. In addition, process changes have been rolled out across the service to ensure that reports of damp are handled better and technical inspections are booked at source to avoid unnecessary delays.

The learning from the co-location activity as well as other feedback mechanisms is driving a programme of improvement activity called 'Rethinking Repairs' which will include an end to end review of the repair ordering process and a redesign of current repair reporting channels.

The work to harmonise and simplify the citywide repair ordering process is now complete with order raising staff now using the same diagnostic software maps and task codes to raise repair orders regardless of geographic location.

Introducing an effective self-service portal for tenants to book their own repairs remains a key priority for Customer Access and Housing Leeds and this is currently being developed as part of the replacement of current Housing ICT systems. Effective self-service will free up resources to enable more complex repairs to be better and more robustly diagnosed.

A joint piece of work between Housing Leeds and Customer Access is currently being developed to review further the customer experience of reporting a repair across all of our different contact channels (contact centre, housing office, community hub and online) - from the first point of contact right through to the repair being completed.

This service design work may highlight the need for co-location of other specialist teams from Housing Leeds to help to upskill CSO's in particular problem areas and will enable the service to have a better understanding of issues that customers are reporting from their perspective.

Position Status (categories 1 – 6)

Desired Outcome – These mechanisms are put in place to ensure that customers receive timely notifications of any service assessment appointments and planned works.

Recommendation 3 – That the Director of Communities and Environment leads on undertaking a review of the Council's automated systems of sending notification letters and also seeks to maximise the use of modern communication technologies, including text alerts or emails, to speed up notifications to customers in relation to any assessment appointments and planned works.

Formal response:

- It was acknowledged during the enquiry workshops that repair confirmation letters for emergency repairs are particularly unhelp to customers as they arrived after the repair is completed. This function has now been turned off in the repairs ordering system.
- Right to Repair legislation requires confirmation letters for repair appointments to be sent out and therefore the function will not be turned off for non-emergency repairs. However,

through the project to replace the current repairs ordering system, the use of more innovative notifications (text and email) is being developed.

Previous Update:

Confirmation letters for emergency repairs remain turned off.

The replacement repair ordering system has not yet been implemented and it is likely that it will be the end of the year before it is. In the design and configuration there are two main elements that will improve the current position.

It will be possible to configure the preferred communication method for individual tenants in the new system and therefore repair confirmations will be set up to be sent out instantaneously by SMS text or email with the option to still sent letters for tenants who's preference this is. The self service module in the new system will also enable and promote tenants 'self-serving' around repairs and tenants having online access to repair and appointment information will reduce the reliance on the Council sending out confirmations in the future.

Current Update – Feb 2020

As the Housing ICT system has not yet been replaced, it has not been possible to deliver the full range of benefits through the new system. However, some initial work has taken place with colleagues in Customer Access & Housing Leeds working with current tenants to develop improved repairs processes based on tenants needs.

The outcomes to date include improved communication between contractors and tenants with a focus on the timing and quality of SMS text reminders and making it easier for tenants to re-arrange repairs.

As these processes are reliant on the contractors / Leeds Building Services own systems, improvements are being introduced ahead of the replacement of the Housing Leeds ICT systems.

Same position as last update re final paragraph. As the CIVICA Cx system has not yet been implemented, it has not been possible to deliver these benefits. The system is due to go live quarter 3 2020/21.

Position Status (categories 1 – 6)

Desired Outcome – That appropriate resources are put in place to undertake the task of effectively simplifying benefit notification letters to customers.

Recommendation 4 – That the Director of Communities and Environment leads on looking at the feasibility of establishing a task force with the appropriate software and legal expertise to focus on finding an effective means of simplifying existing benefit notification letters that will not be open to legal challenge.

Formal response:

A clear objective was set to review all key customer letters and notifications and make appropriate changes to simplify the wording, in order to reduce avoidable and repeat contact. This work is progressing well. A target has been set to reduce avoidable contact where we can, by April. A major piece of work been undertaken to overhaul Benefit notifications. Examples of the changes that have been made are as follows:

- 37 paragraphs have been amended, fixing either faults or to make the notification simpler for the customer and less confusing.
- All letters now only (and rightly) request that customers tell us about their income changes when the claim is still “live and in payment”.
- Appeal rights on all letters are now consistent for each tenure type.
- An “age related” program review has been carried out and this has resulted in a reduction of 8,000 notifications being issued per year. Most of these were issued where there was no change to entitlement and legislation did not force us to notify the customer. These letters have also being reviewed to make them more understandable for the customer.
- Extensive work has been completed on the landlord letters. Information on overpayments is much clearer and explains why recovery is being made from them. The landlord notifications now promote a link to the council’s website, enabling landlords to access additional information held for their tenants.
- In addition to the above, a number of changes have been made to the Council Tax Bills to help reduce avoidable contact (e.g. nil balance bills), help explain how their bill is calculated and signpost charge-payers to additional information.

Further work is intended to actually summarise the benefit notification but this is subject to a much wider piece of work around customer self-service. Whilst provisional work is underway, realistic progress is not likely to be made until the second half of this financial year. As this will require extensive testing, go live of such may not actually be until 2018/19.

Good practical examples of changes made include:

- Previously notification letters were sent out to customers informing them that there was no change to the amounts payable. This caused confusion amongst customers and caused unnecessary telephone contact. These “no change notifications are no longer sent out, which will have a big impact on reducing avoidable contact.
- The wording in letters to customers regarding Council tax support and housing benefit has been improved so that they are much clearer. For example:
 1. Council tax support and housing benefit statements were often confused by customers as a bill they needed to pay the wording has been changed to state “This is not a bill, this is a statement, and you have nothing to pay”.
 2. Letters regarding changes to benefit calculations and customers entitlements which is changing in accordance with bedroom requirement policies. For example the amount of benefit payable when children reach five and ten changes, these letters are now much clearer, giving customers a good understanding of why their benefit amount have been altered.
 3. The wording in letters regarding the “single room exemption” and effect on customers has also been simplified.

Previous Update:

Regrettably the intended work has not materialised in 2018/19 due to resources being focussed on the preparation for the introduction and impact of Universal Credit. It is intended to re-baseline notifications in 2019/20 and scope what we wish to develop.

Current Position – Feb 2020

The impact of Universal Credit Full Service adjusted the emphasis of this work as ALL new working age claims for help with Housing Costs, with the exception of Supported Exempt Accommodation and Temporary Accommodation cases, now go through the Universal Credit Gateway rather than being a claim for Housing Benefit.

Since October 2018, when Full Service was introduced, there has been a decline of 31% in the number of Working Age Housing Benefit cases. The numbers of Supported Accommodation and Temporary Accommodation cases are minimal but the nature of the claims means that they are administratively heavy.

The next major step of the Universal Credit programme is Managed Migration which Government has advised can be anytime up to 2023. This is when all remaining Housing Benefit working age cases will transfer over to the DWP with the exception of Supported Accommodation and Temporary Accommodation cases.

Members may wish to note that the implementation of Universal Credit has resulted in a natural decline in contact at the contact centre specific to Housing Benefit of nearly 25% in the rolling 12 month comparison January to December against the previous year and over 40% reduction in the rolling 3 months October to December against the corresponding period the year previous.

Not discounting the major change, and the need to balance the amount of resource put into notifications for a reducing work area, there has been additional amendments to notifications but not to the extent of establishing a task force of software & legal expertise as the time taken to develop an improved notification would not guarantee reduced contact nor give a return on the time invested and is not considered a good use of resource given the expected decline as managed migration to UC progresses.

Members can be assured though that extensive work continues to be undertaken within the area of Council Tax. There are 350,000 billed households and our objective is to simplify bills, letters & processes for charge-payers so they have a clearer understanding of correspondence received, reduce contact and promote on line self-serve facilities.

Position Status (categories 1 – 6)

Desired Outcome – That the Council's Interactive Voice Response telephony system continues to be development and remains fit for purpose.

Recommendation 5 – That the Director of Communities and Environment undertakes a review of the Council's current Interactive Voice Response telephony system to identify possible improvements, including the feasibility of introducing a voice telephone input option as part of the system.

Formal response :

The current IVR menu has been amended to ensure that we direct customer calls quickly and easily to the appropriate officer within the contact centre.

Changes:

- The Leeds Housing Options(LHO) IVR menu has been merged with the main Housing Leeds menu to ensure that all housing contact is delivered via one IVR process and enables all call types to be captured and directed quickly and concisely.
- The Housing Leeds menu now includes divert out to LHO, Benefits and Choice Based Lettings options preventing unnecessary transfer for customers and ensuing these are dealt with by the dedicated trained staff where needed
- The new LHO menu ensures emergency cases are informed of correct concise steps to follow, now promotes additional contact methods of drop in sessions and advises of timescales for cases
- The Choice Based Lettings menu option links direct to information capture for housing forms. This releases CSO time on the phone lines as these form requests can be completed out of hours
- The wording has been updated on all areas of the menu with clear advice and information for a better customer experience
- There is also appropriate signposting to the website for further information where appropriate
- Unnecessary information has been removed and transferred to the web with qualifying audio links
- Further work has been planned in to review the contractor information that is provided as part of the IVR menu.
- The option to provide a voice-activated system to direct customers to the appropriate menu options and person to speak to is being explored. The facility is available, but we are assessing the costs and associated benefits with installing such a feature.
- There is a greater customer focus with less recorded information and options are based on identifiers that customers will understand (postcode), rather than what is meaningful to council (contractor).

Previous Update:

- We have recently procured an automated voice activated system which will be applied to our general enquiries number initially, but will then be applied to all our main lines. We hope to implement soon after 1 April 2019, with a later phase extending this facility to calls for individuals.
- While we have made some improvements to the existing IVR over the last 12 months, we have just initiated a full and fundamental review of the system with the aim to simplify the messages and use customers to help us get it right. We are starting with Housing and Council Tax services.

Current Update – Feb 2020***EVR (Enhanced Voice Recognition System)***

As part of phase 1 Customer Access are introducing the EVR onto the golden number line, which is the main number for the council switchboard. The system was tested with members of

the public in October to confirm that they could navigate how it works prior to go live. The go live of this system is now planned for mid/end of February. There have been a couple of delays to the go live of this project due to changes to IT procedures and operational restrictions such as the general election and purdah which prevent IT system deployments.

The next steps for this project is to review the system once it has gone live to ensure that it is working as expected. If successful Customer Access will review and propose other service telephone lines that it could possibly be applied to. The service will also review the additional functionality which is available through this system such as being able to ask secondary questions on the menu or look to direct calls for named individuals.

Review of IVR and Customer Experience:

Customer Access have introduced telephony design principles from Feb 2019, which provide governance ensuring that the customer experience is now the focus of any change to the IVR menu.

In October 2019 the service created an automated change management process to ensure that all relevant officers are informed of and can contribute to all upcoming changes. Using these two new ways of working the service has already reviewed the Council Tax line IVR to ensure that it is streamlined and updated in line with the design principles.

The next steps for this work is to review additional IVR menus in this way including those currently in place for Housing Leeds calls.

Position Status (categories 1 – 6)

Desired Outcome – That appropriate investment is made into robust customer service data collection and analysis to inform longer term strategic planning.

Recommendation 10 – That the Director of Communities and Environment works with the Director of Resources and Housing to explore opportunities for further investment into robust customer service data collection and analysis to assist with longer term strategic planning.

Formal response :

Investment into this will be developed and done so by gaining feedback from customers via the “Voice of the Customer work”. This work will be commenced once the work is complete on providing a replacement system to prepare for the decommissioning of Siebel.

Previous Update:

- We have been hampered in this particular recommendation since the decommissioning of Siebel in 2017. A Customer Relationship Management system is essential to provide the level of insight required to assist meaningful longer term planning around identifying service improvements. DIS, with Customer Access, have been developing a replacement CRM system in-house, and have made excellent progress. It is hoped the new system could be live in hubs and the contact centre within months.
- We have procured, on a trial basis, a customer survey system which provides us with voice of the customer and allows us to target improvements based on customer

experience and views. This was introduced in January 2019 and is providing an important aspect of customer insight to help us target improvement initiatives.

Current Update – Feb 2020

Customer Access are currently in the process of rolling out a new Customer Relationship Management system across their face to face sites which will collect information on what types of housing enquiries are being dealt with in the community hubs and one stop centres. This new CRM is already in use at the City Centre Hub, Compton Centre and St Georges Centre and is being rolled out across the city over the coming months. This will improve the level of insight for Customer Access as to the types and numbers of housing enquiries being received across the city.

Customer Access have recently introduced a new process to capture feedback from customer service officers on a regular and ongoing basis so that they have a clear view as to what are the current issues for housing tenants from the people dealing with them at first point of contact.

Issues highlighted by customer services officers are passed directly to the performance and relationship officers in Customer Access who then work with colleagues within Housing Leeds to resolve any that they can and then feedback to the customer services officers, what actions have been taken and any procedural changes made.

Housing Leeds are also developing a performance report to compare data across all customer access channels including contact centre call data, housing office call data, web traffic data and contractor data (call data and number of repairs raised).

By analysing this data on a monthly basis, Customer Access and Housing Leeds can identify and analyse trends and compare and contrast different access channel data to look at correlations. This will also allow us to identify any anomalies/increases and undertake discovery work to understand reasons behind this and develop service improvements incorporating User Centred Design principles.

Position Status (categories 1 – 6)