

# Report for LGR Joint Scrutiny Committee 19 January 2023 – Customer Strategy and Service Standards

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**New Somerset Council**

**Executive Member(s):** Cllr Val Keitch - Lead Member for Local Government Reorganisation & Prosperity and Cllr Federica Smith-Roberts - Lead Member for Communities

**Local Member(s) and Division:** N/A

**Lead Officer:** Alyn Jones – LGR Programme Director

**Authors:**

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## 1. Summary / Background

- 1.1.** This report introduces four customer focussed products which have been developed in preparation for vesting day of the new Council.

Following consideration by the LGR Joint Scrutiny Committee, the Executive is being asked to approve these products.

- 1.2.** The Customer Strategy (see Appendix A) outlines the Council's strategic vision for customer access. Complimenting the Strategy are the corporate Customer Promise and Customer Standards (Appendices B and C) which have been developed to ensure customers are clear about what they should expect from the Council when they contact us through a variety of contact channels.

- 1.3.** In addition to Customer Standards (Appendix C), Service Standards have been developed, for specific operational services delivered to customers by the existing councils in Somerset, and are set out in Appendix D. Many of these standards will remain unchanged at vesting day for each council area, but in some areas some alignment has been possible to provide a Somerset-wide approach when the new Somerset Council comes into being. Links are provided in Appendix D to details for each service area. This report sets out how the standards have been developed by the various services and used to help consider options for the new Somerset council budget.

## **2. Recommendations**

- 2.1.** It is recommended that the Executive:

- (i) Approve the draft Customer Strategy, Customer Promise and Customer Standards.
- (ii) Approve the baseline Service Standards in Appendix D.
- (iii) Delegate authority to make any consequential amendments to these service standards following approval of the 2023/24 Budget for Somerset Council, to the Lead Director for Economic and Community Infrastructure and Director of Commissioning.
- (iv) Delegate authority to publish and communicate (ii) and (iii) as Interim Service Standards for vesting day, to the Lead Director for Economic and Community Infrastructure and Director of Commissioning.

## **3. Reasons for recommendations**

- 3.1** Approaches to customer access have been managed independently across the five councils. We recognise that demand for our services is increasing along with the expectations of greater access, ease of use and quality of customer service. So, there is now a need to ensure that, from the outset, the new council sets a vision and plan to meet these demands and expectations.
- 3.2** Knowledge and understanding of operational service standards will help inform decisions on the Medium-Term Financial Plan and inform the public of the standard of service they can expect from vesting day.

## **4. Other options considered**

- 4.1.** No further options have been considered. Each of the products have been prioritised as a 'must have' for vesting day, to help customers, communities and staff understand the Councils vision and day one operational standards.

Within each service area alternatives for alignment or differentiation of service have been considered and are summarised in the service standard templates (Appendix D).

## **5. Links to County Vision, Business Plan and Medium-Term Financial Strategy**

- 5.1.** The Customer Strategy provides the vision and strategic direction for the design and delivery of customer service within the Council. Whilst the Strategy does not include detailed costings it will need to be funded within the Medium-Term Financial Plan.
- 5.2.** Service Standards have helped with evaluation of savings options for the Medium-Term Financial Plan.

## **6. Consultations and co-production**

- 6.1.** Internal consultation on developing the draft Customer Strategy, Customer Promise and Customer Standards has been undertaken with:
- **Customer, Digital and Website Workstreams** – various engagement throughout product development.
  - **Service Alignment Workstream** - various engagement throughout product development.
  - **Customer, Communities and Partnerships Board** – approach endorsed 16/11/2022

Service Standards have been developed and co-produced by sub-workstreams comprising staff members from all councils, contractors, and other organisations. In addition, all customer documents above, including service standards, have been considered by the Fortnightly LGR workshops and LGR Programme Board.

- 6.2.** Five focus group sessions have been held with a total of 42 members of Somerset Councils Customer Panel to test and obtain feedback about the customer principles, with amendments incorporated into the documents.

## 7. Financial and Risk Implications

- 7.1.** There are no direct financial implications from these recommendations. Without the Service Standards however there is a risk of Medium-Term Financial Planning decisions being made in absence of understanding of impact on service delivery, and risk of lack of clarity on levels of service in different areas from day one.
- 7.2.** There are no specific risks arising from these recommendations however failure to deliver against these products could cause reputational harm. This will be managed through consistent performance reporting and corrective management actions as set out in the Council's Performance Management Framework.

Likelihood	3	Impact	3	Risk Score	9
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## 8. Legal and HR Implications

- 8.1.** There are no direct legal or HR implications to the recommendations being accepted.

## 9. Other Implications

- 9.1.** There are no implications arising directly from this report relating to:

- Community Safety
- Sustainability
- Health and Safety
- Health and Wellbeing
- Social Value

As part of future service alignment, if service standards change, the full range of other implications will need to be considered on a service-by-service basis.

An Equalities Impact Assessment has been completed and appended to this report, this details actions needed to ensure that protected groups are not negatively impacted by the endorsement and implementation of the products presented in this report.

## **10. Scrutiny comments / recommendations:**

**10.1.** To date the proposed Strategy and Service Standards have not been considered by a Scrutiny Committee.

## **11. Background**

**11.1.** The background to the Customer Strategy, Promise and Standards is set out in Appendix E.

**11.2.** The background to Service Standards is set out in Appendix D.

## **12. Background Papers**

- 12.1.**
- Appendix A – Draft Customer Strategy
  - Appendix B – Draft Customer Promise
  - Appendix C – Draft Customer Standards
  - Appendix D – Baseline Service Standards
  - Appendix E – Background – Customer Strategy

## Somerset Equality Impact Assessment

Before completing this EIA, please ensure you have read the EIA guidance notes – available from your Equality Officer

**Version**

2.0

**Date**

22<sup>nd</sup> December 2022

### Description of what is being impact assessed

**Customer Strategy** – the vision and approach to customer service for the new Somerset Council.

**Customer Charter and Standards** – set out our approach to customer service and what our customers can expect.

**Customer Excellence Model** – reflect the principles in our charter and strategy.

**Service Standards** - developed for operational services delivered to customers by the existing councils in Somerset.

Implementation of a new Customer Strategy and Charter for the new Somerset Council, underpinned by an ambition to achieve the Customer Service Excellence standard. The development of the strategy has been informed by an analysis of existing Strategy’s across each authority and a series of workshops with Customer Service managers, customers (through the Customer Panel) and engagement with the wider Customers, Communities and Partnerships workstream and service alignment.

Service Standards have been developed by sub-workstream leads who have worked with their staff members from all councils, contractors, and other organisations.

### Evidence

**What data/information have you used to assess how this policy/service might impact on protected groups?** Sources such as the

[Office of National Statistics](#), [Somerset Intelligence Partnership](#), [Somerset's Joint Strategic Needs Analysis \(JSNA\)](#), Staff and/ or [area profiles](#), should be detailed here

A broad analysis of data from the Somerset Intelligence Partnership has informed our approach and understanding to ensure that the products consider impacts on protected groups. The 2021 Census data is yet to be released in its entirety, therefore the data obtained is mostly using 2011 data.

A summary of the data identifies:

The population of Somerset has increased by 7.8 % since 2011 – this is higher than the increase experienced within England and Wales of 6.3%.

Misc.	Total population	571,600	100.0%
	Live in rural area	269,868	48.0%

### **Analysis by Protected Groups**

**Race and Ethnicity** - 94.6% of Somerset's population are 'White British'. This proportion is typical of that seen in Somerset's neighbouring local authorities but much higher than the England and Wales average (80.5%). Somerset's non- 'White British' residents tend to be concentrated in and around the county's principal towns.

**Age** - There has been more than a 50% increase in the number of people aged 70-74 and there are a third more people aged 90 or over. The rise in the number of people in the mid-20s to mid-30s is also noticeable with a nearly 30% increase in the number of people aged 30-34. Three quarters of the population growth between 2011 and 2021 was in the 65+ age range.

**Disability** - 5.1% of the Somerset population (26,945 people) have described their health as bad or very bad. This is in line with the Southwest average and slightly below the figure for England and Wales (5.6%).

There are nearly 9,000 households (3.9% of all households in Somerset) containing at least one adult with a long-term disability or health condition

**Who have you consulted with to assess possible impact on protected groups?** If you have not consulted other people, please explain why?

- Customer, Website and Digital Workstreams – regular updates and more recently the draft strategy and customer promise and standards has been shared and feedback provided.
- Service Alignment/CCP working group – to ensure that core services within Service Alignment are aware of the Strategy, have an opportunity to feedback and influence the principles.
- Workshops – initially to develop ‘strawman strategy’ with Contact Centre managers.
- Customer Panel – October and December 2022 – follow up sessions with a particular emphasis on the Customer Promises and Customer Standards



### Analysis of impact on protected groups

The Public Sector Equality Duty requires us to eliminate discrimination, advance equality of opportunity and foster good relations with protected groups. Consider how this policy/service will achieve these aims. In the table below, using the evidence outlined above and your own understanding, detail what considerations and potential impacts against each of the three aims of the Public Sector Equality Duty. Based on this information, assess the likely outcome, before you have implemented any mitigation.

Protected group	Summary of impact	Negative outcome	Neutral outcome	Positive outcome
<b>Age</b>	<ul style="list-style-type: none"> <li>Older residents may lack technical literacy skills or be less able to make use of digital services.</li> <li>Young people may feel unable to make their voice heard regarding the shaping of our services.</li> </ul>	☒	☐	☐
<b>Disability</b>	<ul style="list-style-type: none"> <li>Certain disabilities may impact the channels through which customers are able to contact us:                             <ul style="list-style-type: none"> <li>Difficulty using online services for those with visual impairments</li> <li>Difficulty understanding aspects of our services for those with learning difficulties</li> <li>Accessibility requirements for those with physical disabilities, particularly in our face-to-face hubs.</li> </ul> </li> <li>If not published in different formats, the Customer Strategy, Promises and Standards maybe less accessible to those with visual impairments or learning difficulties.</li> </ul>	☒	☐	☐

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<b>Gender reassignment</b>	<ul style="list-style-type: none"> <li>We have considered this Protected Characteristic and do foresee any disproportionate positive or negative impact on this group.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Marriage and civil partnership</b>	<ul style="list-style-type: none"> <li>We have considered this Protected Characteristic and do foresee any disproportionate positive or negative impact on this group.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Pregnancy and maternity</b>	<ul style="list-style-type: none"> <li>We have considered this Protected Characteristic and do foresee any disproportionate positive or negative impact on this group.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Race and ethnicity</b>	<ul style="list-style-type: none"> <li>Individuals whose first language is not English may find it challenging to request/report a service with the council as they may not be confident writing in English or may struggle to accurately describe their concerns in a second language.</li> <li>If not published in different formats, the Customer Strategy, Promises and Standards maybe less accessible to those whose first language is not English.</li> </ul>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Religion or belief</b>	<ul style="list-style-type: none"> <li>We have considered this Protected Characteristic and do foresee any disproportionate positive or negative impact on this group.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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<b>Sex</b>	<ul style="list-style-type: none"> <li>We have considered this Protected Characteristic and do foresee any disproportionate positive or negative impact on this group.</li> </ul>	☐	☐	☐
<b>Sexual orientation</b>	<ul style="list-style-type: none"> <li>We have considered this Protected Characteristic and do foresee any disproportionate positive or negative impact on this group.</li> </ul>	☐	☐	☐
<b>Other, e.g., carers, veterans, homeless, low income, rurality/isolation, etc.</b>	<ul style="list-style-type: none"> <li>People in rural areas experience relatively poor mobile signals or broadband speed</li> </ul>	☒	☐	☐

**Negative outcomes action plan**

Where you have ascertained that there will potentially be negative outcomes, you are required to mitigate the impact of these. Please detail below the actions that you intend to take.

Action taken/to be taken	Date	Person responsible	How will it be monitored?	Action complete
Customers will continue to be provided with the same access routes into Council services. These will be consolidated channels which will offer one front door from April 2023. This includes online, telephony, face to face, email, and social media.	01/04/2023	CCP Customer Experience Workstream	Ongoing analysis of Contact Centre system data alongside measurements of customer satisfaction.	☐
Customer Panel to ensure there is	31/08/2023	CCP	Ongoing basis through tracking of	☐



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representation from younger age groups, as well as engaging with stakeholder groups that provide services and/or function as a voice for younger people, to extend our reach.		Customer Experience Workstream	representation on Panel and will be incorporated into a review of the Panel (tranche 2 product)	
<p>Ensure that the Customer Strategy, Promises and Standards are published in formats that meet the needs of customers that may be visually impaired, experience learning difficulties or where English is not their first language.</p> <ul style="list-style-type: none"> <li>• Quick reference formats of the documents to be accessible on the Somerset Council website, allowing for ease of access and the ability to access translation tools via the website.</li> <li>• Offer large print or braille versions of the documents.</li> </ul> <p>Produce a video which can both visually and audibly share key messages.</p>	30/03/2023	Gareth Denslow	<p>Publication of documents in the formats detailed.</p> <p>Formal milestone to be added to Project plan/s.</p>	<input type="checkbox"/>
Translation services which are in place across each of the authorities, to support non-English speaking customers, will continue to be in place from vesting day.	01/04/2023	CCP Customer Experience Workstream	Ongoing	<input type="checkbox"/>

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Ensure that at all Customer Service Advisors are adequately trained and refreshed regarding equalities.	01/04/2023	CCP Customer Experience Workstream	Vesting Day audit and ongoing Line Management	<input type="checkbox"/>
	Select date			<input type="checkbox"/>
	Select date			<input type="checkbox"/>
	Select date			<input type="checkbox"/>

**If negative impacts remain, please provide an explanation below.**

<b>Completed by:</b>	<b>Gareth Denslow</b>
<b>Date</b>	<b>23/11/2022</b>
<b>Signed off by:</b>	
<b>Date</b>	
<b>Equality Lead/Manager sign off date:</b>	
<b>To be reviewed by: (officer name)</b>	



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Review date:



## GUIDANCE NOTES FOR REPORT AUTHORS

**\*\*\*\*\*USE THIS TEMPLATE FOR REPORTS TO EXECUTIVE, EXECUTIVE MEMBER KEY AND NON-KEY DECISIONS AND OFFICER KEY DECISIONS GREATER THAN £500K TOTAL COUNTY COUNCIL CAPITAL / REVENUE - SPEND / SAVE / GRANT FUNDING OR WHERE PROPOSALS SIGNIFICANTLY AFFECT COMMUNITIES LIVING IN TWO OR MORE COUNTY COUNCILLOR DIVISIONS\*\*\*\*\***

If your proposed decision relates to the commissioning or procurement of a contract, then you **MUST** consult Commercial & Procurement Team and Contract Solicitors in Legal Services at an early stage in drafting your report and ahead of sharing the report with senior managers or elected members.

Complete the report by replacing the light blue text in each section with your own and please use the default "normal" font which is Microsoft New Tai Lue size 12 in black (do **not** justify text).

Please ensure all sections of the template (particularly the sign-off boxes) have been completed in full – please do not amend the template. **Incomplete reports will not be accepted by Democratic Services, and this can result in your proposed decision being delayed.**

**An Equalities Impact Assessment must be completed for all decisions – unless the Equalities Manager (Tom Rutland) has agreed otherwise (this should be done as early as possible before writing the decision report).** EIAs need to be sent to the Equalities Manager at least 3 weeks before decision to ensure adequate consultation and to allow for advice to be provided to the author to finalise the impact assessment. **The Monitoring Officer will not sign-off reports unless the Equalities Impact Assessment has been completed and is included with the decision report.**

Decision-makers **must** have regard to officer advice before exercising delegated powers (which is why officer reports are completed), and report authors must follow the procedures for taking key decisions as set out in the guidance notes on the intranet.

**For all key decisions there are legal requirements for advance publication of a proposed decision in the Forward Plan** (published on the Council's web pages). Report authors need to ensure that they complete the key decision proforma and send this to Democratic Services. **Proposed key decisions should be published as far as possible in advance and not the minimum 28 days before the decision meeting is held.**

Please note that reports which contain **embedded documents will not be accepted**. Please reference them as appendices and include them separately.

Report authors need to circulate draft reports to the internal officer consultees on checklist below at least 3 weeks before the decision date. **The internal officer consultation must be completed before a draft report is circulated to councillors.** The sign off boxes must be completed prior to submission to Democratic Services (for

further advice contact Scott Wooldridge, Monitoring Officer, on 01823 357628). **The sign-off should not be completed unless you have had a response, no response from an internal consultee does not mean that you can assume their agreement – report authors are responsible for completing consultation and need to adequately plan for this ahead of decision meetings.**

**Report authors need to ensure they plan for the preparation of reports, internal officer consultation, member consultation and for reports to be ready for any Executive pre-agenda meetings or publication deadlines. Late reports will not be considered and SLT have agreed these will be deferred to the next Executive meeting.**

Any local county councillor for any electoral division significantly affected by this proposed decision should be consulted prior to any reports being published ahead of the decision meeting and they must be informed of any subsequent decision taken.

Decision reports and records are required in order to ensure decision makers have the relevant information to take a decision and to be able to demonstrate compliance with the council's governance requirements.

Key decisions are published on the council's website. However, Officers may need to consider whether a members information sheet or additional public communication should be done to ensure relevant stakeholders know the details of the decision taken.

### **What happens after the decision meeting?**

All decisions taken by Executive, Executive Members and Officer key decisions are published on the council's website.

All key decisions can be subject to 'call-in' for consideration by the relevant Scrutiny Committee within 5 working days after the decision has been taken. If a call-in is agreed by the relevant Scrutiny Chair, then this will have the effect of putting the decision on hold until Scrutiny have considered any issues and made recommendations back to the decision maker (this could take several weeks). The only exception to this rule shall be 'urgent' decisions requiring immediate implementation. Urgency can only be applied where delay in implementing a decision would be to the detriment of the interests of the Council. The case for urgency must be agreed by the Chair of the relevant Scrutiny Committee prior to the decision being implemented and the reasons set out in the report. **Please liaise with Democratic Services at an early stage if your report requires the use of urgency so that the necessary procedures are followed.**

**\*\*\*THE INSTRUCTIONS IN COLOUR SET OUT IN THIS TEMPLATE ARE FOR GUIDANCE ONLY – PLEASE ENSURE YOU REMOVE THEM FROM THE COMPLETED DOCUMENT\*\*\***