



Digital Experts Programme

Dorset County and Districts digital renewal case study

The issue and context

The rural councils in Dorset, in partnership with the county council, have for a number of years developed and operated an award-winning joint web platform, dorsetforyou.com that provides information on and access to a wide range of services.¹

The councils recognise that as demand continues to grow, resources continue to shrink and customer service continues to shift online, the traditional models of service delivery need to be reshaped to provide a much better digital experience, a wider variety of channels (including contact via mobile devices) and lower costs.

While the partners feel they have achieved a great deal of success and learnt much through their shared work on [dorsetforyou](http://dorsetforyou.com), a priority for the future is to redesign services in ways that are truly user-focused and encourage both customers and staff to take advantage of the potential of modern digital thinking and technologies, including mobile devices such as smart phones and tablets.

This move includes using the latest digital design principles (drawing where appropriate on national guidelines, assets and developments), reducing complexity by focusing on the information that customers really need to do their business online, adopting a more transactional approach to service provision via the internet and making services accessible via different devices.

¹ In addition to Dorset County Council, the partners are Christchurch Borough Council, East Dorset District Council, North Dorset District Council, Purbeck District Council, West Dorset District Council and Weymouth and Portland Borough Council

The Dorset mission statement is that ‘Dorset citizens can easily and quickly transact and find the council information they need, so that they can get on with the things that matter in their lives. We want to champion and support the digital ambitions of our services by designing and delivering the best possible digital services based on customer insight.’

A key element underpinning this shared ambition is a modern, cost-effective web platform that can deliver digital services for both today’s and tomorrow’s customers and provide:

- Greater clarity and consistency around the services offered and accessibility from the wide range of different devices now used by customers
- Clearer and simpler customer journeys, making it easy to navigate the site even for those with limited digital experience and skills
- The flexibility to keep pace with evolving customer needs, behaviours and aspirations, including the ability to make rapid changes to templates etc.
- Analytical capabilities that will allow the councils to learn from and respond to customer experiences and feedback and thereby continually improve the site
- Better integration with social media channels to encourage increased engagement with customers
- Reduced costs through the use of common or co-developed technology.

The project objectives and targets

The Digital Experts project therefore offered the partners an opportunity to refresh their overall approach towards digital after some eight years of operating the dorsetforyou.com site. There were three main strands to the project:

1. Work on customer-focused design approach that would involve a wide range of services and staff across the partnership. This would establish a set of principles and a framework for future digital developments as well as helping to produce refreshed content and user journeys.
2. The application of this design approach in key service functions, thereby transforming service delivery from a user perspective, eliminating unnecessary or unproductive work and cutting costs. This case study highlights the work undertaken in two areas:
 - The shared planning service involving three of the Dorset partners – North Dorset, West Dorset and Weymouth and Portland
 - Children’s services
3. Activity to build a flexible prototype services platform that would replace and significantly improve upon the councils’ existing website and content management system and support re-usable content, templates etc.

The Digital Experts funding would be used specifically to bring external skills from a company with direct experience of customer-focused and technical design to help the councils engage staff and residents and create the prototype platform. The Dorset partners committed to meeting any additional costs involved in developing the prototype or launching the full platform.

Given their history of shared development and their ambition to reduce costs through exploiting common or co-developed technology, the partners were particularly keen to explore the possibility of taking advantage of the open-source and publicly-available codebase used by the Government Digital Service (GDS) to create the GOV.UK website (www.gov.uk).

This offered the potential to create a largely off-the-shelf digital platform for local government that could be shared freely with other councils, would require very little expense to customise and would save millions of pounds if widely adopted by the sector.

As for outcomes, as well as increasing the numbers of residents using digital services and producing demonstrable improvements in customer satisfaction, thereby reducing the pressure on telephone and face-to-face channels, the project was expected to deliver significant savings to the participating councils in the region of £250,000 over a five-year period.

This figure was based on the projection that the capital cost of acquiring a replacement website and content management system on the open market would be between £100,000 and £150,000 and the costs of supporting and developing the existing website – currently £50,000 per annum – would be halved by the introduction of the new platform.

Clearly, if other councils took advantage of the work in Dorset, the savings would be substantially increased.

As regards the project timetable, the partners aimed to complete a discovery and design phase during the summer of 2015. The discovery stage would involve analysing customer insight data on usage and preferences and running a series of wide-ranging workshops looking at content and end-to-end customer journeys. The design stage would then build on this work to produce a component functional design for the platform and wireframes with the customer journeys optimized to give the best user experience.²

² 'Wireframing is a way to design a website service at the structural level. A wireframe is commonly used to lay out content and functionality on a page which takes into account user needs and user journeys. Wireframes are used early in the development process to establish the basic structure of a page before visual design and content is added.' Source: <http://www.experienceux.co.uk/faqs/what-is-wireframing/>

This initial phase would be followed by three months of development work, subject to procurement. If the subsequent evaluation of the prototype proved successful, the full platform would be delivered and live by June 2016.

The approach and progress to date

By May 2015 the partners had established a project board, appointed an internal project manager and agreed the brief that would be used to appoint an external consultant to help build the requirements. As a result, in June FutureGov was appointed via G-Cloud to support the councils in completing phase 1 of the project (discovery and design).³

Following a kick-off meeting in the middle of the month, and having been supplied with a range of background data including web analytics, contact centre data and relevant reports, the company began supporting the Dorset partners on the key strands of the project.

Implementing customer-focused design

Over the summer, the partners held a series of engagement workshops, involving more than 100 councillors and staff from a wide range of services and different levels within the councils.

'The workshops were fantastic. They really helped us to clarify where and what we wanted to be.' Head of Business Improvement, Dorset Councils Partnership

Alongside the workshops, the consultants also carried out a range of investigations, including reviews of the current user journeys, website content and operation of the content management system.

A number of very valuable outputs emerged from these workshops and other work in this phase:

- An updated set of design principles to underpin the partners' future digital developments, with an emphasis on 'digital by design' rather than 'digital by default'. These principles were signed off by the Partnership Board and by the councils' chief executives, thereby providing a solid framework for subsequent work with individual service functions.

³ The UK Government G-Cloud consists of a series of framework agreements with suppliers, from which public sector organisations can buy services without going through a full tender or competitive procurement process, plus an online store of services covered by G-Cloud frameworks

The Dorset design principles are as follows:

1. *Start with needs – user needs not council needs*
 2. *Do less – keep it simple and link to other information where possible*
 3. *Let your content reflect our brand vision – choose every sentence, image and page with care*
 4. *Design with data and iterate – polish each digital service until every transaction runs smoothly*
 5. *Do the hard work to make it simple – don't settle for 'good enough'*
 6. *For everyone – accessibility and usability go hand in hand*
 7. *Build digital services, not websites – so citizens can quickly get on with their daily lives*
 8. *Content for citizens, not customers – stick to providing a service for citizens (but recognise that traded services may have different requirements)*
- A renewal of the central dorsetforyou team's ethos and structure, re-energising the team and extending its approach to align with the partners' wider ambitions for developing digitally. For instance, the tasks of content creation and user research have increasingly been separated out, which has helped the team to deploy a wider range of research methods, including:
 - Remote video testing, where users' pathways through specific content and processes are filmed with their agreement. This has proved invaluable in 'getting inside' people's thought processes and in highlighting to service managers the problems users are facing in carrying out their business online.
 - Rapid feedback sessions with potential users in popular customer locations such as libraries, swimming clubs and leisure centres. Staff can show users alternative prototypes of screen layouts for example and get immediate responses.

'We've become much more driven by data, rather than relying on intuition. For instance, where service managers used to react if they had one user complaint, we can now show them that another 499 people have used the service quite successfully'. Senior Content Designer

- A new set of tools and perspectives that can be used across the partnership. For instance, the Government Digital Service's design principles have now been widely adopted (see <https://www.gov.uk/design-principles>) as have many of the principles of agile project management.⁴ The councils have also developed a set of 'personas' to help them understand and cater for key customer groups in the county.

'The GDS guidelines have become our bible – about 98 per cent of what they contain makes sense for us. What's great is that staff in service departments are increasingly 'getting it' and applying the principles by themselves'. Senior content designer

⁴ For one approach to agile project management, see <https://www.agilebusiness.org/>

- A clearer understanding that although the website remained very important and needed to become less focused on providing information and more on supporting transactions, the partnership should be considering its wider ‘digital presence’, including the many way digital would permeate its residents’ lives.

Dorsetforyou.com - Personas

name		age	where	statement	sees council as...	information depth
Naomi	★	21	Somerford, Christchurch	coping with tight budgets and benefits	a support mechanism	lots of detail
Alice		17	Winterborne Whitechurch, North Dorset	can't wait to be independent	not relevant for my life	just the basics is enough
Mildred	★	81	Highcliffe, Christchurch	I want to enjoy the rest of my life.	a support mechanism	more than the basics
Lynn		67	Preston, Weymouth	Hopes life goes on like this for a while	a support mechanism	lots of detail
Dan		40	Corfe Mullen, East Dorset	Work hard, play hard	a business	keep it short, got no time
Eesha		34	Winfrith Newburgh, Purbeck (rural)	Tech savvy with a can-do attitude	a business	just the basics
Ken (commercial)	★	47	Dorchester, West Dorset	Challenged by running a little business	a business	need to know all the little quirks

★ primary personas
(their needs should be fulfilled because it will cater for a lot of others)

Working with key service areas

The principles, tools and perspectives outlined above have been applied in the partnership's work on developing digital strategies in key service areas. These include:

Planning service

Three of the Dorset partners – North Dorset, West Dorset and Weymouth and Portland – have a shared planning service. As part of their programme to improve performance and significantly enhance the customer experience, the planning team have enthusiastically embraced digital approaches. Specific initiatives include:

- Understanding customer needs and contact patterns better – for instance, what are the most frequent customer queries? Surveys suggested that half of all the calls coming

into the three districts' planning service were not actually within their scope, with some even involving questions about services run by other organisations such as the county council.

- Simplifying the information and reducing duplication on the dorsetforyou website, for instance by creating links to relevant pages on the Planning Portal or Planning Inspectorate website.

'Why duplicate information that's already all there on a national site? Head of Planning, Dorset Councils Partnership

- Making digital the default option, including for payments. So all letter templates now emphasise the option to complete transactions online and customers can now pay for planning applications electronically.
- Implementing a triage process for complaints, to ensure the complaint is real rather than for instance an objection to a decision. When residents tick the complaint box on the site, a pop-up box appears and provides information that helps to set expectations.
- Working with Customer Services and the dorsetforyou team to introduce web chat and reduce the failure demand caused by customers being unable to find information easily on the website – particularly the answers to simple factual queries.
- Moving from an old process for Permitted Development and Pre-Application Enquiries that used to involve the customer printing a form, filling it in by hand and posting or emailing a copy back (the information on which had then to be manually entered by staff into the back-office system) to an online application and payment process.
- Acknowledging new applications on receipt, ceasing printing all applications before they have been validated, and carrying out the validation process online, thereby saving on printing, reducing the validation time from 22 to 7 days and eliminating many chasing calls from customers.
- Using electronic tools such as Trello (an aid to teams collaborating on projects) and Skype for internal staff communication and, where appropriate, contact with customers.

Planning appeal service

You can access all the necessary services relating to planning appeals through the [Planning Inspectorate Website](#) .

Appeal online

- [Search for the status of a planning appeal](#) 
- [Comment on a planning appeal](#) 

A section of a planning page on the dorsetforyou website showing links to other sites

A particular project underway involves working with around 227 town and parish councils, which have to be notified of every planning application in their areas. At the moment, the majority of applications are sent out as paper copies. A weekly list is also emailed out. Although comments can be made online, not all the town and parish council clerks use the system and feedback can come in via email or post. The clerks also have a range of different email addresses, including personal ones.

A number of changes will be implemented from April 2017:

- All printing and posting will cease
- The weekly list will be switched off, as the same information can be obtained via the website
- Comments will only be accepted by logging into the website and correspondence will be restricted to .gov email addresses.

The planning team recognise that these changes represent a huge cultural shift and have been carrying out very valuable and detailed work with a pilot group of clerks, as well as engaging with the Dorset Association of Town and Parish Councillors and their own county and district councillors. There will be a big publicity drive about the new approach in early 2017.

The shared planning service is now showcasing its innovations to other planning services in Dorset in order to highlight the positive impact of taking a digital-led approach.

Children's services

Historically Dorset's Family Information Service focused on childcare information, but it has now moved beyond being a directory of services towards providing a wide range of information for and about children and young people.

A number of changes have taken place in the way information is collected, managed and presented, stimulated by the Digital Experts project as well as a wider transformation programme within children's services and Dorset's digital strategy. These include:

- The creation of a digital editor's post for children's services in September 2015. Previously, there were around 26 separate editors, some of whom were only responsible for maintaining a few pages as part of their wider job role. This number has now reduced to around seven, who work on specific sections in collaboration with the digital editor.

- The new editor has worked closely with the dorsetforyou team and has been trained to a high level, enabling the post holder to approve articles and to act as a point of expertise on GOV.UK guidelines and plain English.
- The editor also works closely with staff in the service functions to share evidence of how people are finding information on the site and navigating their way through it. This contributes to better customer journeys as well as challenging pre-conceptions (for instance, most visitors do not initially go to the home page). It also helps to highlight where the service functions are providing too much detailed policy background or, alternatively, have omitted key pieces of information that customers require.
- The new post has helped children's services to move manual processes online, by providing e-forms for transactions such as work permits or chaperone licences.

A specific area of focus has been the Special Educational Needs and Disability Services 'Local Offer'. This has involved a complete rethink of the way in which parents are consulted and information is collected and presented. Four sections have recently gone live and a further three will be launched in January 2017.

Building a new digital platform

Alongside their work on user-focused design, the consultants had begun to investigate whether the GDS code base would be suitable as the basis for both the front and back end of a new digital platform. This included discussions with GDS itself, although it was initially difficult to establish appropriate contacts.

The Dorset partners recognised from the outset that there could be risks involved in adopting a set of coding that had primarily been aimed at delivering a specific website (GOV.UK). However, GDS had promoted their assets, code, templates and schemas as being reusable. The councils were therefore keen to exploit them if possible. To support their approach, they followed a structured process of investigation and analysis.

Nevertheless, the partners were disappointed when in August 2015 FutureGov's initial findings highlighted that there was not one complete documented instance of the code that could be used for the partners' entire publishing platform needs. Rather, there were a number of connected individual modules making up this functionality. How these modules had been assembled was complicated and largely undocumented.

FutureGov reported that the partners could make use of many of GDS schemas and templates for the front end of the new platform⁵ but advised against using only the GDS code for the back

⁵ The GDS templates did not allow for the prominent images that were considered essential to enable traded services such as wedding venues or leisure centres to compete for revenue against commercial suppliers, so some additional work would have been required

end. Overall, the conclusion was that building the prototype (and subsequent digital platform) using only the GDS codebase, although theoretically possible, would require a start almost from the beginning and therefore would be neither practical, given the project timescales, nor affordable.

The consultants' final report to the project board, delivered in September 2015, therefore proposed that the new digital platform to be delivered in the next phase of the project should be built using a mix of GDS and custom code. The consultants also put together a working prototype of the platform on these lines, based on a small number of user journeys in council tax and social care.

During the autumn of 2015, the project board continued to explore the options open to it. In particular, the board asked for:

- More information around the benefits of the consultants' proposed technical approach versus other options, and how its perceived risks could be mitigated, as well as a stronger indication of how the revenue costs of supporting this recommended option would stack up
- Greater detail about the amount of custom code that would be required to fill in the gaps in the GDS code
- A stronger business case around the overall benefits of the project that could form the basis for partner council bids for increased capital and revenue funding to support the work.

At this stage, the partners still retained some hopes that GDS might develop its code in a more re-usable form and were encouraged by statements emerging from the department including an October 2015 blog.⁶ But it became clear over time that this work would not proceed as anticipated.

⁶ See <https://insidegovuk.blog.gov.uk/2015/10/27/rebuilding-gov-uks-publishing-tools/>

Blog

Inside GOV.UK

Organisations: [Government Digital Service](#)

Rebuilding GOV.UK's publishing tools

Brad Wright, 27 October 2015 — [Product changes](#)

As Neil explained in [the GOV.UK 3rd birthday post](#), we're focused on 2 main priorities for the rest of this financial year.

This post is about the first of those 2 priorities and why it's so important:

“ To consolidate the publishing tools and page templates we built so quickly into a coherent platform, which we and others can build on more easily ”

We've had a small team of developers dedicated to this platform consolidation work since we [set out our goals](#) at the start of the year, and we've been [reporting our progress every two weeks](#). Now we're increasing our focus on this work, with several teams collaborating on it until the end of March.

An extract from the Inside Gov.UK blog, October 2015

By December 2015, significant concerns remained and the board decided that the team should put together a specification of requirements and go through a procurement process.

The first part of 2016 was therefore spent putting together a draft specification of requirements for two related elements of work:

- The digital platform itself
- Further design support to ensure content and customer journeys were appropriately re-designed for the new platform to maximize the user experience.

The plan was to run the procurement over the summer of 2016 with the aim of making a final choice of supplier by the end of September.

Early in this period, the project team held discussions with their procurement colleagues about digital procurement frameworks.⁷ They were advised to be very clear about their requirements, since different frameworks are applicable to different types of procurement – for instance, open-source versus proprietary or software versus consultancy.

This issue was discussed at a project board meeting in mid-April 2016, where it was agreed that the preference was to:

- Do one procurement for both elements – the digital platform itself (software) and user-focused design expertise (consultancy) – rather than two separate procurements
- Use a digital procurement framework if possible – one that did not rule out either proprietary or open-source solutions for the digital platform.

The partners subsequently outlined their requirements and preferences to Crown Commercial Service (CCS) and engaged them to help finalise their requirements, develop the evaluation criteria and advise on the most appropriate framework to use. Meanwhile, the project board also agreed to renew its existing web service for a further year, from July 2016 to June 2017, at which point the councils would migrate to the new digital platform.

Having carried out some preliminary ‘soft’ market testing, the partners issued a specification using the Digital Outcomes and Specialists (DOS) framework in mid-August 2016 and received a wide range of responses. By early September the project team had finished a scoring exercise and had selected three finalists to take through to the stage of full written submission and presentation.

At the conclusion of the procurement process, the project board reviewed the outcome. At that point, the board concluded that the information gained through the procurement process had not been sufficiently detailed to provide an appropriate level of assurance that, in particular, the most appropriate technical solution had been identified.

At the time of writing this case study, therefore, the board is focusing its efforts on analysing and procuring the technology required and hopes to conclude this phase of the project by March 2017.

The outcome – successes and challenges

Despite the set-backs with the technical platform, the Dorset partners feel that the project has been hugely beneficial in accelerating their digital journey and raising the profile of ‘digital’ across their councils, as well as in generating real improvements for their customers and increasing the take-up of digital channels. For instance, the proportion of transactions carried

⁷ The project team for the procurement was put together following the guidelines at <https://www.gov.uk/guidance/digital-outcomes-and-specialists-buyers-guide>

out online for the top ten high-volume services increased from 49.11 per cent in quarter 1 of 2015/16 to 54.96 per cent in quarter 1 of 2016/17.

The design principles, thinking and stimulus provided by the Digital Experts project have also helped contribute to identified savings in the region of £156,000 made by the Dorset partners through their recent digital improvement work. Details are set out below.

The financial benefits

Dorset County Council has delivered £92,000 of staff savings in its *contact centre* revenue budget in 2016/17 as a result of a combination of work to reduce avoidable contact and improve its digital services.

Specific service areas have also benefited from cost reductions:

The *free school meals service* has been automated to remove hard copy confirmations and notifications to parents and schools. The option for parents to print their confirmation or request a hard copy has been retained but only approximately 10 per cent do so. This has resulted in a £5,000 annual saving and instant notification to schools.

Two types of *waste permits* are now supplied in electronic format. Removing the need to send paper copies of correspondence and permits is saving £6,000 per annum.

In the Dorset Councils Partnership shared *planning service*:

- There are savings in annual printing costs of around £13,000 per annum
- The planning team estimates that an equivalent of around two employees' time has been saved through digital redesign – a notional saving of around £40,000 per annum including on-costs. Critically, this newly released capacity has been used by the service to continue delivering significant improvements, with staff able to concentrate on higher-value and more complex work in support of service transformation
- Meanwhile, failure demand has dropped virtually to zero as customers have benefited from clearer processes and information, the backlog of applications has been reduced, and applications are handled much quicker.

The non-financial benefits

These include:

- The assets and learning developed during the project, including templates, user research findings and customer journeys, will provide an excellent starting point for the development of any future platform.

- Discussion internally on requirements is much more user-focused and evidence-based. Different parts of the organisation, such as the customer access teams, are now actively promoting digital options during their conversations with customers and are feeding back suggested improvements to the online service to the dorsetforyou team.

*‘Staff in the contact centre are very good at working out how far to push someone towards digital. They routinely emphasise the advantages of going on the Planning Portal for instance.’
Customer Services Team Leader, Dorset Councils Partnership*

- The central team is now interacting much more effectively with service departments. Whereas previously they were often dealing with web editors, they now regularly have discussions with the actual content creators (typically more senior professionals). The adoption of agreed design principles and GDS guidelines is helping to focus and simplify content.

‘The project has really helped to change our discussions with the service departments. Everything is much more customer-focused and evidence-based than before.’ Senior Content Designer, dorsetforyou

- The key technical requirements for any future platform have become even clearer, including the need for more flexibility in how content is created and displayed, the ability to alter elements of the site such as templates in-house to reflect changing user journeys or seasonal variations in service delivery, and greater scope to personalise the user experience of the platform.⁸

To take the specific example of children’s services, although the project team feel that it is too early to measure the impact of the work in any detail, they believe that the new digital approaches have provided a significant stimulus and an excellent platform for relooking at the information that children and young people need, rethinking priorities, and providing support in an accessible and timely fashion.

Key learning points

A number of key points emerge from this project:

- Despite the set-backs they faced on the technical platform, the Dorset partners nevertheless managed to make good use of the Digital Experts project to refresh their design approach, build better relationships externally with customers and internally

⁸ The current website can display services based on the customer’s postcode, but not according to the services they actually use or need

with staff, significantly improve some key online services and develop a set of assets such as customer journeys that can be re-used in the future.

- Key service areas – including examples with complex processes and/or challenging customer profiles – have been encouraged and supported to take a highly digital approach to redesigning their service offerings. This has led to major improvements in the customer experience as well as reductions in cost.
- The GDS guidance on design principles have proved very useful and have been widely adopted among the Dorset partners. However, if Government is going to maximise the value of the digital assets it has developed (such as the GOV.UK code), it should engage and involve colleagues from across the public sector to help co-design and test these assets before promoting them widely. This will help manage the expectations of other parts of the public sector who may wish to use these assets. Any future developments of a similar nature should therefore be designed and documented with sharing in mind – involving other public service bodies as part of the design process.
- It remains important for project teams to go through a process of analysis and contingency planning when making major decisions about digital infrastructure, drawing on external support where appropriate. This will help to ensure that any assets used are appropriate and a fall-back position is in place. If Dorset had not gone through such a process, even more time and resources could have been wasted in trying to adopt the GDS code.
- Finally, the challenge of managing and sustaining a partnership of seven different councils must not be underestimated, particularly when the partners wish to move beyond creating a joint website towards a wider consideration of their future digital requirements. Therefore, it is vital to ensure that a shared digital vision and strategy is in place at an early stage to help navigate complex decisions over future direction – for instance, whether to invest in proprietary or open systems.

Next steps

While the Dorset partners review their next steps on procuring a technical platform, the dorsetforyou team is continuing to work with service departments to improve their digital content and processes. A range of service reviews with a digital focus are planned over the coming months, involving a mix of staff from business transformation, customer services, the dorsetforyou team and the service departments themselves.

‘All the applications to join the housing register have to be done online, but housing remains our top area for customer satisfaction’. Communications and Customer Experience Manager, Dorset Councils Partnership

Although team members are having to work within the constraints of the current website and content management systems, they are also trying to think beyond it towards what a new

platform might offer. They are therefore using this opportunity to clear out the redundant or superfluous information that has accumulated over the current site's many years of operation. This will not only improve the experience of current users, but should also significantly reduce the costs and processes associated with migrating content to a new platform.

A particular concern is to assess which parts of the current site are effective. The team has therefore been working on developing a light-touch' assessment mechanism based on factors such as how quickly users can find what they want and how far they are able to follow – or conversely how far they deviate from – an 'ideal' user journey. This analysis will be valuable in informing the design of the replacement platform.

Contact for further information

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