

## The issue and context

To help meet the resourcing challenges presented by the reductions in council funding – and consequent impact on staffing levels – Wyre Council is seeking to increase the levels of customer self-service through the introduction of e-forms that are integrated both with the website and the back-office processing systems.

Located in Lancashire in the North West of England, the borough includes the towns of Thornton Cleveleys, Fleetwood, Poulton-le-Fylde and Garstang, covers an area of 283 square kilometres, and has a population of 108,000 and 334 staff. Approximately 51,000 council tax payers reside in the borough, and council tax enquiries account for approximately 20 per cent of the 124,000 incoming customer enquiries made to Wyre Council.

Council tax enquiries are currently made through four main channels:

- The Civic Centre customer enquiry desks – these are located in the main council office at Poulton-le-Fylde, and are staffed by trained generic revenues and benefits assessors.
- The Mobile Advice Centre – an advice bus that visits various locations in the borough. The vehicle is staffed by trained generic revenues and benefits assessors who can access the council's CRM and revenues/benefits software systems remotely.
- Via the council website through e-forms and emails, but there is currently no integration with the revenues software system.
- Via the phone.

All channels currently require council staff to be involved in the process – whether it is handling the phone or face-to-face inquiry, or manually re-keying the data supplied by an email or existing e-form.

Central government support (via RSG baseline assessment) has reduced by 63 per cent since 2010/11 - an average reduction of £543,000 p.a., and subsequent staffing reductions mean that going forward switching those customers who can do so to self-serve will be essential. As part of this, Wyre is engaged in a long-term initiative to encourage residents to use e-forms when they need to contact the council.

In 2014, Wyre purchased benefits integration software that enables customers to make applications for housing benefit and council tax support via the internet, without the need to complete a paper application form. The software is now fully integrated into the council benefits system enabling information input into the electronic claim form to be uploaded without the need for re-keying.

The software removes many instances for customers to make face-to-face or telephone contact with the council regarding their benefits. This is contributing to a reduction in the costs associated with benefits administration, with significant savings anticipated in terms of staffing, printing, postage, electronic storage, and secure disposal of confidential data costs. As regards savings so far from the benefits implementation, Wyre Council estimates that it has already realised savings of approximately £50,000 per year just on new claims alone. This equates to the salary costs of two assessors including on-costs (employers' pension and national insurance). Wyre expects to double those savings once the full implementation is complete.

The intent of this project is to replicate this approach to reducing the costs to the council from council tax administration by introducing integrated e-forms.

## The project objectives and targets

The project set out to offer customers the means to manage their council tax affairs – such as registering a change in circumstances or setting up a direct debit – via e-forms available on the council's website. Local residents make nearly 25,000 council tax enquiries to Wyre Council per year, which makes up approximately one fifth of the total volume of customer enquiries.

By offering customer self-service that integrates directly with the back office, the e-forms would:

- Offer customers 24-7 access to the council tax services
- Remove the need for customer to call or travel to the council offices – saving both the resident and the council time and money
- Reduce the amount of staff resources required to administer council tax, by removing the need for manual intervention, data handling and re-entry.

The funding was used to procure the e-forms software from Victoria Forms, and partly to pay for integration into the existing back-office system provided by Northgate.

The council also wanted to work with their customers to help them develop the skills necessary to utilise this technology and therefore reduce digital exclusion. As part of a council-wide training course offered in May 2015, two members of the contact centre team participated in a day's Digital Champions training. Residents who present at the civic offices are encouraged to use the public access PCs available to them, and callers are encouraged to try the website as an alternative to the phone.

## The approach and progress to date

The project team comprised the head of contact centre, an ICT project manager and users of the back-end systems. Wyre identified Victoria Forms as the preferred supplier for the integrated council tax e-forms in late 2014, and following a successful procurement process, began implementation in May 2015.

Implementation was led by the Wyre project team, who began by testing the security of Victoria Forms to ensure that having them connected to the web page would not make the council's website vulnerable. Having passed this test, the next stage was to link to the Northgate integration connectors, and map the fields between the two systems to ensure they would match and exchange the data.

Having mapped the fields, and in some cases amended them to make them compatible, the next task was to connect the e-forms software from Victoria Forms to the Northgate integrator product. This was achieved by the end of May 2015, and the project team began testing the e-forms software within a Northgate testing environment (a safe space to input dummy records and data to check that data is exchanged between systems without errors arising).

Testing offered an opportunity for system users to familiarise themselves with the new tool and feed in their views on how it could work. One example of how user feedback has helped shaped the solution is their request to ensure that the identity of the person completing the form is captured – this was based on their experience of working with these forms on a day-to-day basis, and the fact that on occasion a person ineligible to complete a form would do so. The IT team then liaised with Victoria Forms to amend the forms to accommodate these requirements

The direct debits module went live with customer service staff in October 2015. For the first week, they used direct debit change requests that had come through the post, keying in the data to simulate a resident or customer filling one in online. As a result, minor bugs in the system were identified and subsequently rectified.

Following the go-live of the direct debits module, the limited project resources available impeded progress in implementing other modules, including ones required to cover a single person discount and change in circumstances. This is a result of the resources available in the council which has a staff of 340. The council was also affected by severe storms and flooding on the 5th and 19th December, and as a result, staff were diverted to dealing with the immediate aftermath and subsequent claims for flood grants and council tax/NNDR reliefs.

During late 2015 and early 2016, the change in circumstances and single person discount element of the software module continued to be tested in a live environment at the customer service desks and on Wyre's Benefits Mobile Advice Centre. Officers continued to identify issues with this part of the system.

The challenges the project has encountered as regards these modules are due to a number of related factors. This includes the variation in circumstances that can be changed – for example, there are over 20 criteria for a request for a single person discount (such as a resident becoming the only adult living in the house, or the resident's partner becoming a student). In contrast, setting up a direct debit is relatively straightforward.

A further challenge was presented by the recent welfare reforms which have necessitated frequent changes to the Northgate system into which the Victoria e-form product connects. This has required the project team to liaise with both suppliers to determine the root cause of each issue before it could be rectified.

Wyre has also taken a number of steps to promote the direct debit self-service. Residents calling the council are played a message as they wait, informing them that it is possible to manage their direct debit online, and the service has also been advertised on the website. Contact centre staff are also proactive in promoting the direct debit service to callers.

March and April are the busiest times of the year for the council tax team, with the annual bills being sent out to all 51,000 council tax payers. To promote the use of direct debits going forward, the annual bill advertises the link to the online direct debit form.

## The outcome - successes and challenges

The e-forms offer two principal sources of benefit – both a function of volumes. The integration into the website facilitates customer self-service and avoids the need for telephone contact, while the integration into the back-office saves internal processing time by removing the need for staff to manually re-key the data or send information to colleagues to do so.

Wyre estimates that the time saved by avoiding the manual re-work required in a typical council tax transaction can range between two and 20 minutes (setting aside the potential need to re-contact the customer if errors in the information are found). Assuming an average of five to ten minutes of staff time, the costs of manual intervention equate to £2 per transaction.

Figure 1. Indicative savings from e-forms to date

Saving per e-forms transaction	Volume of transactions to 12 April 2016	Calls avoided = £2.83	Staff processing time saved = £2.00	Total
Direct Debit	413	£1169	£826	£1995
Single person discount	n/a			
Change of circumstances	n/a			
Totals				

Wyre Council anticipates that avoiding manual intervention in changes in circumstances will likely save more than £2 in the long-term, estimated to be around £3 a case. This is because change in circumstance cases require more manual intervention than direct debit registrations and other transactions.

As the numbers of customers using the e-forms increases, the amount of staffing resource required to handle incoming telephone and face-to-face council tax enquiries will be reduced, with the spare capacity generated being utilised elsewhere in the contact centre to meet the increasing contact centre workload caused by the ongoing roll-out of Universal Credit.

## Key learning points

- In a council of Wyre's size, resources are finite and when an emergency occurs – such as the floods – staff have to turn their hand to anything. This has impacted on timescales in the roll-out of the e-forms functionality.
- Customer adoption of this new tool is partly a function of timing – the new direct debit self-service was launched in the autumn, a quiet time in the council tax yearly cycle in which the need to change or update direct debits would be low. This is reflected in the numbers. However, March is expected to generate greater interest and volumes.

## Next steps

The annual March council tax billing cycle has delayed work to roll-out the other self-services, which will recommence in the new financial year. The module supporting self-service for single person discount is due to be rolled out in April 2016.

Work on testing e-forms supporting changes in circumstance continues with contact centre staff testing a live version. The project team aims to be ready to go live to the public in July 2016.

## Contact for further information

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