REPORT OF THE DIGITAL TRANSFORMATION SCRUTINY PANEL

Foreword by Councillor Brookes, Chair of the Scrutiny Panel

Today we live in a society in which is highly reliant on digital services. This is even more so following the Covid-19 Pandemic. Many of us use digital services for shopping, booking appointments and working. It is vital that we, as a Council, ensure we meet the expectations of our customers by providing the most convenient and easy to use services. At the same time, the Council faces a shrinking funding base and the need to identify ways to make services more efficient. This report sets out the findings and recommendations of the Digital Transformation Scrutiny Panel which sought to gain information into how the Council can further support the digital offering of Council services and to make recommendations as appropriate.

The Panel would like to thank the internal and external witnesses who gave up their time to provide evidence to assist the Panel with its deliberations. These individuals are outlined in Section 4.

1. Background

The topic for this Panel was agreed at the meeting of the Scrutiny Commission on 28th June 2021 and agreed to be progressed at the meeting of the Scrutiny Commission on 10th January 2022.

The Panel's first meeting was on 28th February 2022, followed by subsequent meetings on 29th March 2022 and 27th April 2022. After the third meeting the Panel concluded its initial business on 16th June 2022.

2. Panel Membership

Chair: Councillor Brookes

Councillors Charles, Gerrard, Hamilton, Needham, Seaton.

3. Terms of Reference and Reason for Scrutiny

The Panel's Terms of Reference, agreed by the Panel at its initial meeting on 28th February 2022 and confirmed by Scrutiny Commission on 10th January 2022 were as follows:

This panel will:

- *Identify which forms were most used throughout lockdown and whether more forms should be created to support our customers*

- *Identify whether there is a need to create a personalised front-end login portal*

- *If there is a need, would this be for:*
  - All customers
  - Council tenants only
  - Another key customer group

- *If a front end portal is required, what information should be displayed and how will this integrate with existing software.*

- *Identify economies of scale and potential savings for the Council and/ or service.*

The Scope Document for the scrutiny review undertaken by the Panel is attached at **Appendix 1**. This sets out the above Terms of Reference and Reason for Scrutiny. The document outlines the position at the conclusion of the Panel's work and, therefore, includes additional stakeholders and resources identified by the Panel as its work progressed, notes added to assist the Panel, and a summary of the progress made by the Panel.

4. Evidence, Stakeholders and Witnesses

The Panel received information from the following stakeholders and witnesses:

Information from officers within the Council

- Introduction from Head of Customer Experience on the current position with respect to commercial income generation
- Updates and further information as requested from the Head of Customer Experience and the Information Technology Delivery Manager.
- A demonstration and guidance on the Council's i-Map mapping portal from the Head of Planning and Regeneration.
- Discussion on the communications and marketing strategies used by the Council from the Communications Manager.

Information from other Councils

- Discussion and information regarding the 'Digital Coventry' report from Head of IT and Digital at Coventry City Council, Paul Ward.

Information from other sources

- Insight from Lead Member for Transformation, Councillor Rollings.
- Research findings from panel members on website experience of other Councils and in the private sector and apps used by other Councils and in the private sector.

Documentation

The Panel reviewed documentation as follows:

- Charnwood Borough Council Corporate Strategy 2020-24
- Charnwood Borough Council Customer Service Strategy 2022-25
- Charnwood Borough Council ICT Strategy 2021-23
- McKinsey and Company – A global view of how consumer behaviour is changing amid Covid-19
- Lloyd's Bank – UK Consumer Digital Index 2021
- Lloyd's Bank – Essential Digital Skills Report 2021
- Coventry City Council - Digital Coventry
- Citizens Online – Digital Inclusion in Charnwood

Technical Support was provided to the Panel by:

- Karey Barnshaw – Head of Customer Experience
- Ayman Khan – Information Technology Delivery Manager

5. Summaries of Panel Meetings

Summaries of the work undertaken at each meeting of the Panel are set out in the "Progress of Panel Work" section of the Scope Document at **Appendix 1**.

Full details of the information provided by witnesses and the issues considered by the Panel are detailed in the notes of the Panel's meetings listed in Background Papers section of this report, also attached at **Appendices 2.**

The Panel met a total of four times as follows:

Meeting 1 – 28th February 2022
Meeting 2 – 29th March 2022
Meeting 3 – 27th April 2022
Meeting 4 – 16th June 2022

6. Equality Impact Assessment (EIA)

The Improvement and Organisational Development Manager stated that there was not a need for an Equality Impact Assessment.

7. Key Findings

The Panel obtained evidence from a range of sources both internal and external as described in Section 4 above. In doing so the Panel made use of the evidence provided of practice at other councils and organisations with different digital offerings. The following summarises the key findings of the evidence considered by the Panel.

Ideas for Digitally Transforming Services

The Panel considered methods by which the Council could implement digital transformation where it was not already planned. Considering evidence provided, suggestions included:

1. Developing an app which could be used by customers to make interactions with the Council easier.
2. Developing a 'hook' which would encourage residents to download an app and continue to use it. A hook would also be beneficial if the Council decided not to develop an app but to promote use of the website more. Some suggestions included continually promoting the benefits of using online services over other methods (time, convenience), ensuring online services are very easy to use and unlikely to cause issues and to link online services to high profile events, such as the Queen's Jubilee.
3. That the Council further developed its virtual meetings capacity to allow residents to meet with officers and customer services through virtual platforms.
4. That the Council's website could be simplified for ease of use and to encourage more engagement.
5. That members of the Council become more involved in the digital transformation of the Council. This might include members receiving training to become 'Digital Champions' within their communities, as well as becoming more active on social media.
6. That Parish and Town Councils and Parish and Town Clerks become involved in the digital transformation processes by working with the Council to identify potentially hard to reach members of the public that may be digitally excluded.

7. That after initially requesting a survey of Charnwood residents to understand their requirements and preferences with regards to the digital transformation of services, this was no longer needed.

Developing an App

The panel had initially felt that the development of an app would be beneficial as it would allow residents to quickly and easily interact with the Council. It was highlighted that many people find using a smart phone easier than using a computer and so it was felt that an app would increase the number of residents interacting with the Council through digital channels. The panel compiled a list of other Councils that had developed an app and were tasked undertake research relating to this.

Following this research, and after further information provided from the Head of Customer Experience and the Head f IT and Digital at Coventry City Council, the panel decided that the development of an app to increase resident engagement was not viable. Other Councils had had negative experiences following the launch of an app and usage rates were typically low. In addition, the cost of developing of an app would be substantial and was not within the Council's budget. However, the panel felt that the Council's website should be made more simplistic, easy-to-use and accessible across all platforms including desktops, tablets and smartphones. This could give the user the experience of using an app but through the website channel, eliminating the issues highlighted.

Identifying a 'Hook'

Evidence from the Head of Customer Experience, the Head of IT and Digital at Coventry City Council and the Communications Manager had suggested that the identification of a 'hook' would be beneficial in the digital transformation of services. Across other local authorities, online portal usage rates were low. In order to improve engagement, it was necessary to find an incentive to encourage customers to start using online services and then continue to use them.

It was estimated that 80-90% of customers made contact with the Council once a year at present, so it was difficult to incentivize use of online services. The panel were informed that a neighbouring authority had only 5% of total residents regularly using the online services provided by the Council. It was explained that this 5% of residents were mainly accessing self service functions on the Council's online portal, involving accessing financial support.

At a subsequent meeting, the panel received information on the most used online forms and the least used online forms available through the Charnwood Borough Council's website in order to try to identify reasons why some forms were more used than others.

A number of solutions were suggested for 'hooking' customers and retaining their interest. For example, continual promotion of the Council's online services (via social media, during telephone calls with customers). Another example was to ensure the online offering was simple and easy to use and caused very few issues in order to encourage customers to return to the website over using other channels. A further example was to tie online services into other popular events or services. Booking a popular service could require customers to sign up to the portal, such as using a tip.

Digital Inclusion

It was highlighted that digital inclusion remained an issue within the Borough. There are large rural areas within Charnwood which may not have sufficient broadband capacity to support some of the Council's digital services. In addition, the panel reviewed a digital skills gap analysis which was undertaken in 2020, detailing the estimated digital exclusion risk. There are also many individuals within the Borough that do not want to engage with the Council through digitally, preferring more traditional channels.

The Council continues to support more traditional communication channels such as telephone and in-person conversations, and the Council's Transformation Service Reviews are ongoing to ensure all departments within the Council are updated to provide the best customer service experience possible, and this includes creating easier and more convenient services for the customer. Therefore, the Council is committed to support customers in using online services where possible.

It was highlighted that some members of the community that were at risk of digital exclusion were difficult to reach. In order to overcome this, the Council attempted to reach these customers through offline channels such as through partner agencies working within the community. It was suggested that working with Parish and Town Councils and Parish and Town Clerks may be beneficial to further improve contact with hard to reach members of the community.

It was also highlighted that members of the Council were a valuable resource in connecting with members of the public. It was suggested that members could consider becoming digital champions within their wards, assisting residents to become more comfortable with the online services offered by the council or promoting what is available.

Ongoing Digital Transformation

At the first meeting of the panel, the Head of Customer Experience gave an outline of the Transformation Service Reviews. Information was provided on areas that each department within the Council had identified could be transformed in order to improve efficiency. The panel was informed that a significant amount of work was already in progress and that some of this would involve digital transformation of services. This included the improvement of the i-Map feature demonstrated by the Head of Planning and Regeneration at the panel's second meeting.

The website management contract was due to be procured in 2023. This would provide some opportunities for upgrading the website. The Panel felt that the procurement should be scrutinized by the Scrutiny Commission at the relevant time.

After receiving information from the Head of Customer Experience, the Information Technology Delivery Manager and the Lead Member for Transformation, the panel

acknowledged that the work being undertaken and planned in the future involved all areas of the Council and would substantially improve the digital offer of the Council.

9.   Recommendations made by the Panel

In undertaking its work regarding how the council could improve digital transformation, the Panel concluded that they were satisfied with the ongoing work being undertaken by each service across the Council, and that this would improve the experiences of customers.

The panel also identified some opportunities to support the digital transformation programme at the Council. The most prevalent barriers to the digital transformation process were the digital exclusion of some residents and the ease of use of the website.

The Panel is making the following recommendations to address these issues.

Recommendations to the Cabinet

Recommendations

1. That the Scrutiny Commission scrutinises the website procurement process, which was due to take place in March 2023.

2. That participation in the Digital Champions initiative be offered to members. This would involve developing the digital skills of members to enable them to support their residents with enquiries and issues involving online services.

3. That member development sessions be organised to increase the digital skills of all members. This would include using the digital services offered by the Council, using IT equipment, using social media and increasing social media presence.

Reasons

1. To allow members to assess the procurement process to ensure the most appropriate contract is successful and can deliver the outcomes required by the Council.

2. To further develop the Digital Champion role to allow members to support their residents.

3. To develop the digital skills of all members and to encourage them to interact digitally with members of the public to promote this method of communication.

Observations

1. The digital transformation work being undertaken by the Council is substantial and thorough and will enhance the service off across the Council.

2. Digital exclusion of some residents was a concern and the recommendations of the panel will help to overcome this. It is important to note that traditional methods of contact and service delivery, such as face-to-face and telephone would remain in place. Digital transformation will help to encourage more residents to use online services, but would not force them to do so.

3. Residents are most likely to use online services when they are easy-to-use, quick and simple to access, with few issues. The Council should ensure the website is as user friendly as possible.

4. Members have a part to play in the digital transformation of services as they are the connection between residents and the Council. Members should promote online services as much as possible in line with the Council's aims.

10. Background Papers

Agenda Papers and notes of Panel meetings available on the Council's website at:
https://charnwood.moderngov.co.uk/ieListMeetings.aspx?CId=251&Year=0

Appendix 1 - Scope Document
Appendix 2 – Meetings Notes – 28th February 2022, 29th March 2022, 27th April 2022, 16th June 2022

SCRUTINY REVIEW: SCOPE

REVIEW TITLE: Digital Transformation Panel

SCOPE OF ITEM / TERMS OF REFERENCE

This panel will:

- Identify which forms were most used throughout lockdown and whether more forms should be created to support our customers

- Identify whether there is a need to create a personalised front-end login portal

- If there is a need, would this be for:
  - All customers
  - Council tenants only
  - Another key customer group

- If a front end portal is required, what information should be displayed and how will this integrate with existing software.

- Identify economies of scale and potential savings for the Council and/ or service.

REASON FOR SCRUTINY

The panel will also ensure that any current projects connected to the IT Strategy and Customer Services Strategy are progressing in a timely and effective manner as well as providing further ideas for how to transform services.

Increase accessibility to the council services helping to raise customer satisfaction levels.

MEMBERSHIP OF THE GROUP

Councillor Brookes (Chair)
Councillor Seaton
Councillor Gerrard
Councillor Charles
Councillor Needham
Councillor Hamilton

WHAT WILL BE INCLUDED
Comparison research gained from other Council's. Officer statements on current projects. Private sector examples

WHAT WILL BE EXCLUDED

KEY TASKS * * including consideration of efficiency savings
- Evaluate existing Council transformation projects   - Make recommendations on future strategy or processes   - Review other Local Authority digitalisation and transformation strategies and processes to learn best practice   - Review other Private Sector digitalisation and transformation strategies and processes to learn best practice   - Provide input into the Council's Transformation Strategy   - Interviewing witnesses and Council officers   - Identify services that are most challenging to integrate or quite simple to integrate   - Send out a survey to our customers for ideas/feedback and to help identify key areas for integration.   - To research the use of apps for services in other Local Authorities and in the private sector.

STAKEHOLDERS, OUTSIDE AGENCIES, OTHER ORGANISATIONS *
- Outside bodies/ agencies who already have this facility.   - Other councils who have this facility.   - IT and CRM (Customer Relationship Management) companies.   - Individuals with skills in this area.   - Our current key partners such as Capita and Serco to understand how they will integrate their services.   - Relevant Borough Council departments.

EQUALITY IMPLICATIONS
Is an impact needs assessment required? – to be considered at the Panel's penultimate meeting

LINKS/OVERLAPS TO OTHER REVIEWS
The Council is already working on improving online forms and there are projects underway

Commercialisation Scrutiny Panel	

RESOURCE REQUIREMENTS
Lead Officer: Karey Barnshaw, Head of Customer Experience Support from Democratic Services (Sally Watson)

REPORT REQUIREMENTS (Officer information)
Current Projects (meeting 1) Survey Results (meeting 4)

REVIEW COMMENCEMENT DATE	**COMPLETION DATE FOR DRAFT REPORT**
28 February 2022	June/July 2022

* Key tasks and stakeholders may be subject to change as the review progresses.

PROGRESS OF PANEL WORK

MEETING DATE	PROGRESS TO DATE

28 February 2022	At this meeting, the Panel considered:
	
	• the Scrutiny Scope Document agreed by the Scrutiny Commission updated to list Panel membership and meeting dates;
	• Charnwood Borough Council Corporate Strategy 2020-24
	• key task in the Scrutiny Scope Document, current and future projects at Charnwood Borough Council, including annexes Customer Services Strategy 2022-2025 and Information and Communication Technology Strategy 2021-23.
	• scheduling of further key tasks in the Scrutiny Scope Document for the next meeting of the Panel and consideration of any work members of the Panel would undertake in advance of that meeting.
	
	The Panel agreed:
	
	• that additional information be requested from the Head of Customer Experience, specifically;
	   o the percentage of enquiries that had been made via a smart device,
	   o a summary of the work that has already been undertaken as part of the Transformation Service Review
	   o the McKinsey report, referred to in the Customer Services Strategy 2022-2025.
	   o the most used online forms over the past two years
	• that the Chair meet with the Democratic Services Officer in order to discuss the scrutiny scoping document, and any

	updates required.
	• that work be allocated to members of the panel covering:
	    ○ The front end/website experience of other councils, including successes
	    ○ Exploring apps available at other councils, including successes
	    ○ Front end/website/apps experience in the Private sector, including successes
	    ○ Services offered by Charnwood Borough Council that could be incorporated into an app/ experience for older people

29 March 2022	At this meeting, the Panel considered:
	
	• An updated version of the scrutiny scoping document, updated in accordance with discussions at the previous meeting of the panel.
	• A projects update, containing the information requested by the panel following scrutiny of current and future projects. This included annexes McKinsey and Company – A global view of how consumer behavior is changing amid COVID-19, Lloyds Bank – UK Consumer Digital Index 2021 and – Lloyds Bank – Essential Digital Skills Report 2021.
	• Feedback on tasks allocated to the panel at the previous meeting.
	• The 'Digital Coventry' report, supported by the Head of IT and Digital and Coventry City Council.
	• A demonstration of the online planning applications portal to the panel and the council's i-Map mapping portal that enables spatial searches of planning applications to be made.
	• Identification of key stakeholders.
	• scheduling of further key tasks in the Scrutiny Scope Document for the next meeting of the Panel and consideration of any work members of the Panel would undertake in advance of that meeting.
	
	The Panel agreed:
	
	• That the Head of Customer Experience provide the following information to the panel:
	    ○ any further relevant reports by McKinsey and Company.
	    ○ data on the usage of all forms across the council to the next meeting of the panel.
	    ○ the digital skills gap analysis report before the next meeting of the panel.
	• That the Head of IT and Digital and Coventry City Council provide statistics on the rate of ongoing portal usage at Coventry City Council.
	• That the Head of Customer Experience considered suitable stakeholders with the intention of inviting witnesses to a

	future meeting.
27 April 2022	At this meeting the panel considered: • An updated version of the scrutiny scoping document, updated in accordance with discussions at the previous meeting of the panel. • An update on previously discussed items, including the Digital Inclusion in Charnwood report and the total enquiries received via online web forms. • Information provided by the Communications Manager to identify ways to encourage website usage and self-service. • The development of the panel's survey on residents. The panel agreed: • To consider a recommendation to encourage members to become digital champions within their wards, assisting residents to become more comfortable with the online services offered by the council or promoting what is available. • That the resident survey on digital transformation of services was no longer required.
16 June 2022	At this meeting the panel considered: • The panel's draft final report and recommendations. The panel agreed to make the following recommendations to Cabinet: 1. That the Scrutiny Commission scrutinises the website procurement process, which was due to take place in March 2023. 2. That participation in the Digital Champions initiative be offered to members. This would involve developing the digital skills of members to enable them to support their residents with enquiries and issues involving online services. . 3. That member development sessions be organised to increase the digital skills of all members. This would include using the digital services offered by the Council, using IT equipment, using social media and increasing social media presence.
NOTES: To facilitate witness attendance it is anticipated that times of the meetings will be a	

mix of daytime and early evening. Panel meetings can be run online apart from the final meeting where recommendations are agreed upon.	6

REPORT SUBMITTED TO SCRUTINY MANAGEMENT BOARD

The Panel should aim to complete its work and submit its report to the Scrutiny Commission meeting on or before 8th August 2022.

**DIGITAL TRANSFORMATION SCRUTINY PANEL
28TH FEBRUARY 2022**

PRESENT: The Chair (Councillor Brookes)
              Councillors Charles, Gerrard, Hamilton, Needham
              and Seaton

              Councillor Rollings (Cabinet Lead Member for
              Transformation)

              Head of Customer Experience
              Information Technology Delivery Manager
              Democratic Services Officer (SW)

The Chair stated that the meeting would be recorded and the sound recording subsequently made available via the Council's website. He also advised that, under the Openness of Local Government Bodies Regulations 2014, other people may film, record, tweet or blog from this meeting, and the use of any such images or sound recordings was not under the Council's control.

1.   APOLOGIES

      No apologies were received.

2.   DISCLOSURES OF PECUNIARY AND PERSONAL INTEREST

      No disclosures were made.

3.   DECLARATIONS - PARTY WHIP

      No declarations were made.

4.   QUESTIONS UNDER SCRUTINY COMMITTEE PROCEDURE 11.16

      No questions were submitted.

5.   SCRUTINY SCOPING DOCUMENT

      Councillor Seaton arrived at the meeting at 6:05pm.

      Considered and discussed, the scrutiny scope document for the Panel, agreed by Scrutiny Commission at its meeting on 10th January 2022 and updated to list Panel membership and meeting dates.

      It was suggested that there may be a need to update the scoping document in accordance with discussions at this meeting, particularly following the discussion of item 8 on the agenda (Work Programme and Key Task Planning).

      AGREED that the scrutiny scope document be noted.

6.   CHARNWOOD BOROUGH COUNCIL CORPORATE STRATEGY 2020-24

The panel reviewed the Charnwood Borough Council Corporate Strategy 2020-24.

It was highlighted that the council was customer-focussed and committed to constantly improving customer experience. This should be considered throughout the course of the panel.

AGREED that the Charnwood Borough Council Corporate Strategy 2020-24 be noted.

7.   CURRENT AND FUTURE PROJECTS

In accordance with the scrutiny scope document (key tasks), considered and discussed, a report of the Head of Customer Experience to inform the panel of current and future projects demonstrating the approach to delivering services as outlined in the ICT Strategy and the Customer Services Strategy an how technology will support this

Key points of discussion:

i.   The Head of Customer Experience stated that the following should be considered during the course of the panel:

- Awareness of the impact of new technology in terms of customer and officer capability.
- The council's aim of reducing the total number of systems in order to increase efficiency and reduce costs.
- Any additional services recommended would need to be rational and valid. No assumptions should be made and suggestions would need to be backed by evidence.
- The costs associated with the implementation of any new systems.
- Any considerations regarding discrimination of customers.
- The timescales associated with the implementation of new systems or ways of working.
- The future support required for any new systems.

ii.   It was estimated that 80-90% of customers made contact with the council once a year. Therefore it was difficult to encourage customers to engage with an online system for which sign up/sign in was required as this required effort for little benefit to the customer. It was important that any portals contained a hook to attract customers, or they may not consider the investment to be necessary.

iii.   The online portal of a neighbouring council was accessed regularly by only 5% of those that had signed up. It was not clear what services this small proportion of residents were accessing via the portal.

iv.   It was acknowledged that many customers may prefer to use mobile smart devices to access council services. It was confirmed that all services offered by the council were smart device accessible. The Head of Customer Experience

Charnwood

stated that she would provide information on the percentage of enquiries that had been made via a smart device at the next meeting.

v.   The systems used by the council were all capable of customisations to reflect the requirements of Charnwood residents.

vi.   The timescales associated with the Transformation Service Reviews had been delayed due to the Covid-19 pandemic but the process was ongoing. Progress with this was fed into the council's SWaP Board (Services, Workplace and People Board). The Head of Customer Experience agreed to summarise the work that had already been undertaken as part of the Transformation Service Review and to provide this at the next meeting of the panel.

vii.   The website contract was due to end in 2023 and a procurement process would be completed to ensure good value for money for a new contract.

viii.   The methods available for residents to contact the council were managed equally and were logged and responded to via the same stream.

ix.   The Customer Experience service within the council conducted regular skills and resource audits to ensure that the required experience and skill levels were contained within teams. The service invested in existing staff and ensured teams were trained appropriately for upcoming projects and to meet the aims of the Corporate Strategy 2020-24.

x.   There had been concerns regarding the capacity of teams in other areas of the council to train sufficiently for new systems being implemented.

xi.   It was possible for the council to develop an app although this would incur significant costs. An app would work separately from the online portal on the website and it would not be possible to link both systems. It would be necessary to establish a hook for customers to encourage them to download and continuously use the app in order for its production to be cost efficient. There would be a requirement of strong evidence to suggest an app would be beneficial for residents.

xii.   It was highlighted that information on the needs and preferences of residents would be available following the completion of the survey which would be undertaken by the panel in the coming weeks.

xiii.   A number of other councils had implemented an app, including:

- East Riding of Yorkshire Council
- East Devonshire District Council
- West Oxfordshire District Council
- Dudley Metropolitan Borough Council
- East Goscote Parish Council
- Syston Town Council

- Gloucester City Council

xiv.   Virtual meetings between officers at the council and residents were not yet possible, although it was recognised that this could be beneficial.

xv.   The council had a duty to ensure all customers were able to access all services and that no customer would be discriminated as a result of using a specific contact method. Equality Impact Assessments were provided for new projects where relevant.

xvi.   The Head of Customer Experience agreed to provide the McKinsey report, referred to in the Customer Services Strategy 2022-2025, to members of the panel in advance of the next meeting of the panel.

AGREED

1. The report and discussion be noted.

2. That the Head of Customer Experience provide information on the percentage of enquiries that had been made via a smart device at the next meeting of the panel.

3. That the Head of Customer Experience summarises the work that has already been undertaken as part of the Transformation Service Review and provides this at the next meeting of the panel.

4. That the Head of Customer Experience provides the McKinsey report, referred to in the Customer Services Strategy 2022-2025, to members of the panel in advance of the next meeting of the panel.

8.   WORK PROGRAMME AND KEY TASK PLANNING

Considered and discussed, the key tasks in the scrutiny scope document to be considered at the next meeting of the Panel and any work members of the Panel would undertake in advance of that meeting.

The following summarises the discussion:

i.   It was highlighted that there was a marketing element associated with the engagement of residents in new technologies. The panel was scheduled to interview a witness with marketing experience at a later meeting.

ii.   It was suggested that the panel explored the 5% of residents regularly using the online portal at a neighbouring council, as outlined in the discussion in the 'Current and Future Projects' item on the agenda.

iii.   It was suggested that the Head of Customer Experience provided information to the panel on the most used online forms over the past two years. The Lead

Member for Transformation stated that data on abandoned forms was available. It was suggested that the Head of Customer Experience provided this data to members of the panel at their next meeting.

iv.   It was highlighted that an update of the scoping document would be required following the outcomes of the meeting. It was suggested that the Chair meet with the Democratic Services Officer in order to discuss this, and that the updated scoping document would be reviewed by the panel again at the next meeting.

v.   It was suggested that the website contract procurement should be scrutinised at the appropriate time.

Work allocated to members before the next meeting of the panel was as follows;

Task	Responsibility
The front end/website experience of other councils, including successes	Councillor Seaton
Exploring apps available at other councils, including successes	Councillor Charles
Front end/website/apps experience in the Private sector, including successes	Councillors Hamilton and Needham
Services offered by Charnwood Borough Council that could be incorporated into an app/ experience for older people	Councillor Gerrard

AGREED

1. that the Head of Customer Experience provided information to the panel on the most used online forms over the past two years. The Lead Member for Transformation stated that data on abandoned forms was available. It was suggested that the Head of Customer Experience provided this data to members of the panel at their next meeting.

2. That the Chair meet with the Democratic Services Officer in order to discuss the scrutiny scoping docuemnt, and that the updated scoping document would be reviewed by the panel again at the next meeting.

3. That panel members undertake the work outlined and feedback at the next meeting of the panel.

NOTES:

1. No reference may be made to these minutes at the Council meeting on 25th April 2022 unless notice to that effect is given to the Democratic Services Manager by five members of the Council by noon on the fifth working day following publication

of these minutes.

2. These minutes are subject to confirmation as a correct record at the next meeting of the Digital Transformation Scrutiny Panel.

3. The following attendees listed as present attended the meeting virtually; Lead Member for Transformation, Head of Customer Experience and Information Technology Delivery Manager. The remaining attendees listed were physically present in the meeting.

DIGITAL TRANSFORMATION SCRUTINY PANEL
29TH MARCH 2022

PRESENT: The Chair (Councillor Brookes)
Councillors Charles, Hamilton and Seaton

Councillor Ward (Head of IT and Digital, Coventry City Council)

Head of Customer Experience
Head of Planning and Regeneration
Democratic Services Officer (EB) and Democratic Services Officer (SW)

APOLOGIES: Councillor Gerrard and Needham

The Chair stated that the meeting would be recorded and the sound recording subsequently made available via the Council's website. He also advised that, under the Openness of Local Government Bodies Regulations 2014, other people may film, record, tweet or blog from this meeting, and the use of any such images or sound recordings was not under the Council's control.

9.   APOLOGIES

Apologies were received from Councillor Gerrard.

10.   MINUTES OF PREVIOUS MEETING

11.   DISCLOSURES OF PECUNIARY AND PERSONAL INTEREST

No disclosures were made.

12.   DECLARATIONS - PARTY WHIP

No declarations were made.

13.   SCRUTINY SCOPING DOCUMENT

Considered and discussed, the scrutiny scope document for the Panel, updated following the previous meeting of the panel.

AGREED that the scrutiny scope document be noted.

14.   PROJECTS UPDATE

A report of the Head of Customer Experience to provide the panel with information related to projects, requested at the previous meeting of the panel, was considered.

Key points of discussion:

i.   It was not clear whether the McKinsey and Company report 'A global view of how consumer behaviour is changing amid Covid-19' would be updated. However, a number of reports had been published by McKinsey and Company which may be relevant to the work of the panel. The Head of Customer Experience agreed that she would highlight any relevant reports to the panel.

ii.   The use of corporate email inboxes was often not an efficient process, as it allowed for free text. A more efficient method of contacting the council was the usage of e-forms with specific fields for residents to populate as this would allow the council to request all relevant information required from the customer in one place.

iii. It was requested that the panel received data on the usage of all forms used across the council so that the panel could identify customer needs. The Head of Customer Experience agreed to provide this information.

AGREED

1. That the panel notes the content of the report.

2. That the Head of Customer Experience highlighted any relevant reports by McKinsey and Company to the panel.

3.   That the Head of Customer Experience provided data on the usage of all forms across the council to the next meeting of the panel.

15. <u>FEEDBACK ON TASKS</u>

Members of the panel provided updates on the work allocated at the previous meeting.

Updates were as follows:

Task	Responsibility
The front end/website experience of other councils, including successes *Councillor Seaton had liaised with two councils and found that the appearance and feel of a website was significant to user engagement. It was not clear whether the councils that Councillor Seaton spoke to had a good rate of ongoing portal usage from customers that had signed up. Councillor Seaton agreed to enquire about this before the next meeting.*	Councillor Seaton

Exploring apps available at other councils, including successes *Councillor Charles liaised with four councils and had detailed feedback from two councils. He stated that these councils did not advocate the use of an app. Feedback ratings from customers using the app were poor and the councils did not recommend using an app.*	Councillor Charles
Front end/website/apps experience in the Private sector, including successes *Councillor Hamilton liaised with two private sector organisations. At British Gas, all of the customer tasks were available to complete across all platforms. It was also highlighted that the website reflected an app in terms of the look and feel. It was suggested that this approach could be beneficial because of the ease of use and familiarity, whilst not incurring a significant cost to develop an app.* *Councillor Needham was not in attendance and so no update was provided.*	Councillors Hamilton and Needham
Services offered by Charnwood Borough Council that could be incorporated into an app/ experience for older people *Councillor Gerrard was not in attendance and so no update was provided.*	Councillor Gerrard

AGREED that Councillor Seaton enquires about the rate of ongoing portal usage from customers at the councils she has previously liaised with.

16.   <u>DIGITAL COVENTRY</u>

In accordance with the scrutiny scoping document, to review other Local Authority digitalisation and transformation strategies and processes to learn best practice, the Head of IT and Digital at Coventry City Council attended the meeting to discuss 'Digital Coventry'.

The following summarises the discussion:

i.   It was highlighted that Charnwood had rural areas which may not have the same broadband width as other areas of the borough, and so any services

offered would need to consider this. An [interactive map](#) was available detailing the superfast connectivity in Charnwood. The Head of IT and Digital at Coventry City Council (CCC) stated that customer experiences of IT should be simple, functional and appealing and that with this formula, broadband width would not be a concern.

ii.   The Head of Customer Experience stated that a digital skills gap analysis was undertaken in Charnwood in 2020, detailing the highest risks in digital skills exclusion. It was agreed that the report containing this information would be shared with the panel before the next meeting.

iii.   It was highlighted that it was difficult to incentivise customers to continue to use online portals due to the nature of services being offered. It was suggested that promoting the benefits of online portal usage over other methods of contact, could be advantageous (for example, the facility is available 24/7, often quicker, cheaper for the council). Another incentive would be to ensure service via online portals was good (for example, forms working correctly, quick feedback if required).

iv.   The Head of IT and Digital (CCC) stated that he would provide statistics on the rate of ongoing portal usage at Coventry City Council.

v.   It was suggested that the council would need to better understand customers in order to effectively enhance the website offering.

vi.   The digital offer at Coventry City Council used attractive services to encourage sign up to the portal. For example, customers would have to create an account in order to book a slot at refuse centres or to book activities.

AGREED

1. That the Head of Customer Experience provides the digital skills gap analysis report before the next meeting of the panel.
2. That the Head of IT and Digital (CCC) would provide statistics on the rate of ongoing portal usage at Coventry City Council.

Post meeting note:

The Head of IT and Digital (CCC) responded to action 2) providing the following information:

Current number of MyAccounts (our online customer portal accounts) – 246,379

We have 485 online services in total via MyAccount

49 of these services require users to be logged in (primarily due to having a booking or payment).

17.   PLANNING APPLICATIONS

The panel discussed concerns with the planning applications process with the Head of Planning and Regeneration and the Head of Customer Experience.

The Head of Planning and Regeneration demonstrated the online planning applications portal to the panel and the council's i-Map mapping portal that enables spatial searches of planning applications to be made.

   i.   The Head of Planning and Regeneration stated that that he would share a link to access the portal which could be used by members to identify specific planning applications.

   ii.   It was acknowledged that it was difficult to find specific planning applications using the search functions on the Planning Explorer Portal as the results of searches were not always listed logically. It was highlighted that a new back-office system was currently being implemented and a new customer focussed applications portal would be available by July 2022. It was anticipated that the user experience of the portal would improve following this.

AGREED that the Head of Planning and Regeneration provide the link to access the portal which could be used by members to identify specific planning applications.

Post meeting note: The Head of Planning and Regeneration provided the following link: Cadcorp Web Map Layers (charnwood.gov.uk)

18.   IDENTIFYING KEY STAKEHOLDERS

The panel discussed key stakeholders for interviewing at a future meeting of the panel.

   i.   The panel felt that there was a requirement to interview further witnesses in order to develop a better understanding of how the recommendations of the panel should be formed.

   ii.   The Head of Customer Experience stated that she would consider suitable stakeholders with the intention of inviting witnesses to a future meeting.

   iii.   It was suggested that the panel liaise with experts in the marketing field to identify ways to encourage website usage and self-service.

AGREED that the Head of Customer Experience considers suitable stakeholders with the intention of inviting witnesses to a future meeting.

19.   WORK PROGRAMME AND KEY TASK PLANNING

To schedule the key tasks in the scrutiny scoping document to be considered at the next meeting of the panel and to consider any work to be allocated to members of the panel in advance of the next meeting.

No additional work was allocated to members of the panel for the next meeting of the panel.

NOTES:

1. No reference may be made to these minutes at the Council meeting on 25th April 2022 unless notice to that effect is given to the Democratic Services Manager by five members of the Council by noon on the fifth working day following publication of these minutes.

2. These minutes are subject to confirmation as a correct record at the next meeting of the Digital Transformation Scrutiny Panel.

DIGITAL TRANSFORMATION SCRUTINY PANEL
27TH APRIL 2022

PRESENT: The Chair (Councillor Brookes)
Councillors Charles, Hamilton, Needham and Seaton

Councillor Rollings (Cabinet Lead Member for Transformation)

Head of Customer Experience
Communications Manager
Democratic Services Officer (SW)

APOLOGIES: Councillor Gerrard

The Chair stated that the meeting would be recorded and the sound recording subsequently made available via the Council's website. He also advised that, under the Openness of Local Government Bodies Regulations 2014, other people may film, record, tweet or blog from this meeting, and the use of any such images or sound recordings was not under the Council's control.

20.   APOLOGIES

Apologies for absence were received from Councillor Gerrard.

21.   MINUTES OF PREVIOUS MEETING

The minutes of the meeting held on 29th March 2022 were confirmed and signed as a correct record.

22.   DISCLOSURES OF PECUNIARY AND PERSONAL INTEREST

No disclosures were made.

23.   DECLARATIONS - PARTY WHIP

No declarations were made.

24.   QUESTIONS UNDER SCRUTINY COMMITTEE PROCEDURE 11.16

No questions were submitted.

25.   SCRUTINY SCOPING DOCUMENT

Considered and discussed, the scrutiny scope document for the Panel, updated following the previous meeting of the panel (item 6 on the agenda filed with these minutes).

AGREED that the scrutiny scope document be noted.

26. PANEL UPDATES

A report of the Head of Customer Experience to provide the panel with information on previously discussed items (supplementary item 7 on the agenda filed with these minutes).

AGREED that the panel notes the contents of the appendices.

27. MARKETING AND COMMUNICATIONS

The Communications Manager at Charnwood Borough Council attended the meeting to discuss marketing and communications in relation to digital transformation (item 8 on the agenda filed with these minutes).

The following summarises the discussion:

i.   The Communications Manager highlighted the work of the Communications team within the council, which included the management of internal and external communications, social media, press releases, email alerts, website content management, newsletters, a 'What's On?' information page, design and liaising with external partners.

ii.   The Communications team created an average 160-70 press releases and responded to approximately 160 media enquiries annually.

iii. The Communications team issued 900 email alerts annually and there were approximately 15k members of the public subscribed to receive email alerts.

iv.   The council's social media accounts achieved a reach of approximately 20k people. This was considered to be a good rate in comparison to other local authorities of a similar size. Information on the number of Charnwood residents that used social media in general was not known, although it was estimated that the vast majority of residents did use social media, in line with national trends.

v.   The number of social media followers of the council's accounts had increased by 13.5% on Facebook and 4% on Twitter, during the last 12 months. There was a substantial increase in social media followers during the Covid-19 pandemic, of approximately 400%.

vi.   The area within Charnwood with the most social media followers was Loughborough. The most common age group was 35-44 and most of the council's followers on Facebook were female.

vii. It was highlighted that the average reach for a post on social media from the council's account was 1k (likes, shares, etc), although this varied substantially depending on the nature of the post and engagement activity can be as high as 20-30k reach. The council engaged residents with posts on high interest events such as the Queen's Jubilee and the Loughborough Fair.

viii. The Communications team did regularly promote the council's online services via their social media pages.

ix. It was highlighted that some members were not confident in using their personal social media accounts to communicate with their residents, and that some members were unsure of how to share content. The Communications Manager stated that the Communications team were able to provide advice and guidance to members that were unsure.

x. It was stated that by tagging Charnwood Borough Council on social media posts, an alert would be generated and the Communications team would be made aware of the post. This would provide an opportunity for the Communications team to share the content to reach a wider audience in Charnwood.

xi. It was acknowledged that it was not possible to reach some customers through online channels. It was difficult to ascertain who and where these customers were, although the council had methods of attempting to communicate. The council attempted to reach these customers through offline channels, such as through partner agencies that work closely with communities, print media and by highlighting online services during phone calls with customers.

xii. It was highlighted that the council encouraged Digital Champions to support residents that were not confident in using digital channels. Many members of staff at the council used IT and digital portals in their day-to-day work. This was valuable because these members of staff were able to support residents, family and friends in using online systems if required.

xiii. It was acknowledged that members were a valuable resource in enabling the council to connect with residents in the community, enabling information to be communicated. It was suggested that the panel recommended that members could consider becoming digital champions within their wards, assisting residents to become more comfortable with the online services offered by the council or promoting what is available. In order to enable this, members would need to attend a member development session which would cover information on the online services provided by the council and a guide on using social media to reach members of the community.

xiv. The council's approach was to post interesting and engaging information for residents to acknowledge and share. This would increase the reach and the council's online presence and provide a large audience for further posts containing important information.

xv. It was suggested that another way to make contact with hard to reach members of the public was through parish councils and parish council clerks.

AGREED

1. That the panel notes the information.

2. That the panel consider a recommendation to encourage members to become digital champions within their wards, assisting residents to become more comfortable with the online services offered by the council or promoting what is available.

28. DEVELOPING SURVEY

In accordance with the scrutiny scoping document, the panel discussed the development of a survey to identify customer needs and preferences (item 9 on the agenda filed with these minutes).

The following summarises the discussion:

i. It was highlighted that work was being undertaken to ensure transformation of services was involved in all areas of the council. It was also highlighted that the online services offered by the council were good and that the panel had previously decided there was not a need for an app.

ii. Online services were promoted through various channels and the Communications team at the council was actively creating content to increase followers and the number of residents engaging with online services.

iii. The panel agreed that through the discussions of the panel at the previous meetings and at the present meeting, a resident survey was no longer required. Members were content that residents were receiving a an appropriate online service and that was being undertaken to improve this further and to encourage and support residents to use online services where possible.

AGREED that the resident survey on digital transformation of services was no longer required.

29. WORK PROGRAMME AND KEY TASK PLANNING

To schedule the key tasks in the scrutiny scoping document to be considered at the next meeting of the panel and to consider any work to be allocated to members of the panel in advance of the next meeting (item 10 on the agenda filed with these minutes).

The panel had agreed that a residents survey was no longer required which meant that there would be no items on the agenda for the next meeting of the panel.

The panel were satisfied that no further information was required and that they felt that they were able to make recommendations at the next meeting of the panel.

NOTES:

1. No reference may be made to these minutes at the Council meeting on 4th July 2022 unless notice to that effect is given to the Democratic Services Manager by five members of the Council by noon on the fifth working day following publication

of   these   minutes.

2. These minutes are subject to confirmation as a correct record at the next meeting of the Digital Transformation Scrutiny Panel.

DIGITAL TRANSFORMATION SCRUTINY PANEL
16TH JUNE 2022

PRESENT: The Chair (Councillor Brookes)

Councillors Gerrard and Hamilton

Head of Customer Experience

Democratic Services Officer (SW)

APOLOGIES: Councillors Charles, Needham and Seaton

The Chair stated that the meeting would be recorded and the sound recording subsequently made available via the Council's website. He also advised that, under the Openness of Local Government Bodies Regulations 2014, other people may film, record, tweet or blog from this meeting, and the use of any such images or sound recordings was not under the Council's control.

1.   APOLOGIES

Apologies for absence were received from Councillors Charles, Needham and Seaton.

2.   MINUTES OF THE PREVIOUS MEETING

The minutes of the meeting held on 27th April 2022 were confirmed and signed as a correct record.

3.   DECLARATIONS OF PECUNIARY INTERESTS AND OTHER REGISTRABLE AND NON-REGISTRABLE INTERESTS

No declarations were made.

4.   DECLARATIONS - PARTY WHIP

No declarations were made.

5.   QUESTIONS UNDER SCRUTINY COMMITTEE PROCEDURE 11.16

No questions were submitted.

6.   DRAFT PANEL REPORT AND RECOMMENDATIONS

A draft report of the panel, outlining the key findings and the discussion points of previous meetings of the panel, was submitted (item 6 on the agenda filed with these minutes).

The Democratic Services Officer assisted with the consideration of this report.

The following summarises the discussion:

i. It was suggested that information be added into the final report to outline the panel's discussion regarding the interface of the website. The panel had highlighted that there was a need for a simple and easy-to-use website that could be accessed efficiently across all platforms (desktop, tablet, mobile phone, etc…).

ii. Members of the panel stated that they felt satisfied with the ongoing work of the Customer Experience service and that were confident that the work would improve the services offered by the Council, and would create better experiences for customers.

The panel agreed to make the following recommendations:

1. That the Scrutiny Commission scrutinises the website procurement process, which was due to take place in March 2023.

2. That participation in the Digital Champions initiative be offered to members. This would involve developing the digital skills of members to enable them to support their residents with enquiries and issues involving online services.

3. That member development sessions be organised to increase the digital skills of all members. This would include using the digital services offered by the Council, using IT equipment, using social media and increasing social media presence.

AGREED

1. That information be added into the final report to outline the panel's discussion regarding the interface of the website.

2. That the recommendations set out be included within the final report.

7. ACTIONS AND TIMETABLE FOR REVIEW

The Democratic Services Officer stated that following the amendments to the draft report as suggested, the final report would be submitted to the next scheduled meeting of the Scrutiny Commission.

NOTES:

1. No reference may be made to these minutes at the Council meeting on 4th July 2022 unless notice to that effect is given to the Democratic Services Manager by five members of the Council by noon on the fifth working day following publication of these minutes.

2. These minutes are subject to confirmation as a correct record at the next meeting of the Digital Transformation Scrutiny Panel.