

# Capital Ambition Project Initiation Document



<b>Project Name:</b>	<b>Shared services in Bexley and Bromley: enhancing the capability of front-end customer services through a shared web platform and infrastructure and exploration into further shared service opportunities.</b>		
<b>Lead Authority:</b>	London Borough of Bexley London Borough of Bromley		
<b>Project Sponsor:</b>	Paul Moore, Director of Customer Services, London Borough of Bexley Mark Bowen, Director of Legal, Democratic & Customer Services		
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<b>Date:</b>	19 May 2010		
<b>Project Start date</b>	June 2010	<b>Project End Date</b>	December 2011
<b>Version</b>	<b>Created</b>	<b>Reasons for/Summary of Changes</b>	<b>Author</b>
Draft 1.0	8 April 2010	Initial draft of PID for comments	P Moore
Draft 1.1	12 April 2010	Updated to incorporate comments from colleagues	P Moore
Draft 1.2	16 <sup>th</sup> April 2010	Update to incorporate comments from Chief Executives and senior officers	C Spellman R Hills
Draft version 1.3	19 <sup>th</sup> April 2010	Formatting and small changes made.	P Moore
Draft 1.4-1.5	12 <sup>th</sup> May 2010	Bexley and Bromley amendments after comments from Capital Ambition	P Moore G Ward R Hills B Ford
Version 1.6	14 <sup>th</sup> May 2010	Incorporation of comments.	As above

## 1. Project Overview

<p><b>1.1 Project Summary</b> (Maximum 100 words)</p>	<p>The London Boroughs of Bexley and Bromley wish to pursue the development of several critical areas of shared service provision:-</p> <ul style="list-style-type: none"> <li>• Firstly investing in a joint web platform and a range of other emerging customer contact infrastructure across the two boroughs which would allow us to develop an improved range of fully transactional online services for our customers.</li> <li>• Undertake a feasibility study to investigate options for property suitable for co-location of both borough’s contact centres.</li> <li>• Also, to use this initial pilot to explore further opportunities for shared services beyond a shared web platform and to investigate the possibility of sharing face to face, back-office and other professional functions. Including the potential development of a shared extranet for financial and performance management reporting.</li> </ul> <p>These aims are in line with Capital Ambition’s themes and funding priorities. We are also responding to the wider national agenda as set out in the report <i>‘Putting the Front Line First’</i> where the national efficiency taskforce laid out the challenge to Local Authorities to protect front line services while at the same time making significant efficiency savings through greater shared services and partnership working.</p>
<p><b>1.2 Partner organisations involved in the submission of this bid</b></p>	<p>London Borough of Bexley London Borough of Bromley</p>
<p><b>1.3 Project Aim</b> (Maximum 30 words)</p>	<p>To deliver a standardised and integrated front-end customer services infrastructure to enhance customer access and improve value for money. It should allow both boroughs to make cashable savings while avoiding damaging cuts to our front line services.</p> <p>The project seeks to be a forerunner for further transformational partnership work between the boroughs focusing on back office services as a way of reducing overheads and realising cashable efficiencies.</p>
<p><b>1.4 Project Objective(s)</b></p> <p>Objectives should be measurable and outline the activities you will undertake and the services you will offer to deliver the aim. Each objective should be a one sentence statement, or a number of statements starting with the word ‘to’</p>	<ul style="list-style-type: none"> <li>• To realise 10-15% channel shift to web self service systems, with potential associated efficiency savings of approximately £360,000 as a result of the projects outlined below.</li> <li>• To invest in a shared web platform and other customer contact system technologies through which we can deliver improved self-service functionality to our customers</li> <li>• To initiate a shared, accelerated programme of web self service by combining resources, to improve customer contact flexibility and reduce processing costs.</li> <li>• To use our combined resources to make limited funding streams go further and be able to promote these new transactional services through modern e-communications – SMS alerts, RSS feeds and syndication through popular social networking sites.</li> <li>• To explore options for co-location of a shared contact centre along the borough boundary.</li> <li>• To explore further opportunities for the two boroughs to</li> </ul>

	deliver shared services especially around back office functions where we can make the most of opportunities to reduce our overheads without service standards slipping.
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<p><b>1.5 Is this bid for funding linked to a previous bid or for work delivered in an earlier phase?</b></p>	<p>Yes – Capital Ambition has recently agreed to progress a joint bid by Bexley, Wandsworth and Hammersmith &amp; Fulham to develop a ‘residents’ portal’ offering online self-service functionality for Council Tax and Parking Permits (<b>see Appendix A</b> for the bid and business case). The aim of that bid is to develop a scalable portal, in terms of both extension to a range of other Boroughs and to a broader range of high-volume resident transactions. As part of this latest bid for funding, Bromley would progress a full feasibility to join the ‘residents’ portal’ programme.</p>
<p><b>1.6 Business and Policy Context</b></p>	<p>This project would provide a timely opportunity for Bexley and Bromley to invest in transformation of their service delivery models in order to provide both better value for money to residents and improved customer service. This joint bid proposes several projects that will provide a strong basis from which to develop and deliver a range of practical areas for joint working across front office and support services, which could be replicated to other boroughs.</p> <p>All London Boroughs are confronted with the challenge of generating a programme of substantial ongoing revenue savings whilst maintaining viable support infrastructure to residents, frontline services and elected Members against a backdrop of declining resources and growing customer expectation.</p> <p>Web self-service is regularly flagged up as a key opportunity to make savings and to use technology to deliver core services to customers more efficiently and in a way which is increasingly expected/demanded. The cost differential between the three main channels of customer contact is huge, as illustrated by the latest figures from the <i>Channel value benchmarking service</i>.</p> <ul style="list-style-type: none"><li>• Face to face £8.23 per visit</li><li>• Phone £3.21 per call</li><li>• Web £0.39 per visitor</li></ul> <p>Source: Socitm <i>Insight</i> (December 2009)</p> <p>Boroughs that have already gone down this road are reporting between 10% and 15% channel shift. Based on the generic costings set out above, that percentage channel shift would deliver considerable ongoing savings given our high transaction volumes. For example Bromley receives around 800,000 calls into its call centre each year. If just 10% of these could be moved across to online self-service then the council could see ongoing savings in the region of £220,000. Bexley’s contact centre receives around 450,000 calls per year and a corresponding shift of 10% could therefore result in a saving of £140,000. <u>Therefore there is potential for the projects outlined below to result in efficiencies totalling approximately £360,000.</u></p> <p>The project builds on the recommendations made as part of Capital Ambition’s London Efficiency Challenge, where shared services between LB Bromley and LB Bexley were noted as an area for further work. The matrix below outlines the systems where appropriate investment may be made as part of this bid to support this transformation.</p> <p>This will enable both boroughs to commission joint projects to accelerate infrastructure development and transform their current</p>

models of service delivery, in addition to investigating further options of more cost effective service delivery in the back office. Any joint procurement carried out would be done as a framework procurement exercise so that it could be extended to other authorities as appropriate.

In addition, the proposed projects will promote digital and social inclusion, utilise established green ICT delivery methods, engage software suppliers in flexible software contract provision steered to shared service arrangements, and finally provide the basis of a “cloud computing” solution for other local authorities to join or replicate.

This workstream also includes the adoption of emerging technologies that can be used to efficiently deliver customer services on a shared services basis (SMS, online engagement, social media, etc.). The LPSN secure network could be utilised as the communications backbone for the shared service elements of the proposed work.

As the Boroughs benefit from a shared border, a feasibility study to look at property which may be suitable for co-locating contact centre staff and systems as a first step towards shared services would also be carried out. This would underpin elements of existing accommodation strategies in both Boroughs.

Bexley and Bromley are already working on a joint tender to provide a joint SEN transport service. Web development work could support the delivery of that service to the customer, making it easier for parents to book the service and receive updates and notification of changes etc.

1.7 Funding Requested	Total Project Cost (£)	Amount of REVENUE Funding Requested from CA (£)	Amount of CAPITAL Funding Requested from CA (£)	Total Funding Requested
Transformation and Efficiency Capital Funding	£500,000	.	£500,000	£500,000

The following mapping analysis outlines the many areas where both boroughs are open to discussion on shared work and investment where appropriate. The purpose of these projects is to improve scales of economy and find efficiency savings across both boroughs. These areas will be prioritised and selected for work should the bid be successful:

Customer Contact Component	Bexley Position	Bromley Position	Potential for Shared Development	Approximate Costings
<b>Website</b>				
Shared Hosting of CMS		Currently host the site externally (£30k) keen to look at alternative/ cheaper options	Shared hosting agreements/ savings	<b>£50k</b> Based on current hosting costs
Web Platform / Content	Implementation of Goss v7 CMS is	Bromley is using Microsoft CMS 2002	Potential shared	<b>£450,000</b> (inc hardware,

Management System (CMS)	complete. Looking to revamp the site to further support and direct visitors to self service channels.  Also looking at share point as possible next step.	– which is coming to the end of its life – looking to upgrade.  Also interested in Microsoft Moss 2010.	development and usage based on share point.	software, networking and consultancy costs – based on Microsoft quote (Jan 10). Bexley and Bromley would also need to find funds for content migration and redesign
Online Mapping Solution	Arc view GIS is currently used internally. Looking to procure an online mapping solution to support self service. E.g. find your local councillor, display recycling facilities etc. Integration with LLPG.	Bromley is in the same position and want to make a mapping functionality available for customers – already have initial quotes from Astun technologies.	Shared procurement, development, and usage	<b>£130k</b> (assumes four projects)
Community Database/ directory		Need to find a suitable replacement for the infobromley family of sub-sites, as it resides on the same platform as our CMS. This type of directories are required for the Adult independent living agenda and Children's services.		Potentially covered under CMS development costs – but requirements for these directories are quite sophisticated and a off the shelf plug in may be the best business solution <b>£50k</b>
Delivering Services via mobile technology		Keen to improve accessibility to our online services through all hand held devices		<b>£74k</b> Quote from company Mylo
Syndication of content with social networking sites		Web manger keen to develop automated syndication of Bromley content with social networking sites – facebook, twitter etc	Shared development	<b>£12k</b>
<b>Transactional &amp; Authentication Capability</b>				
Self Service Portal with Authentication	A previous Capital Ambition bid has secured funding for development of a	We also are looking at developing a portal to support authentication –	Option for Bromley to join the CA project.	Costs for Bromley to join the existing partnership are estimated at

	Council Tax & Parking portal. To be developed with LB Hammersmith & Fulham, and LB Wandsworth.	could join in with partnering boroughs		£20k. Shared costs will reduce as the number of boroughs increase.
ASS / Care First / Child Protection  EDRMS  Care Assessments	Currently using the Care First system. Keen to look at the potential of EDRMS within the SS arena and to develop on-line care assessments and management of personalised individual budgets through a web based portal.	Also use Care First and need to develop online care assessments as part of the national independent living agenda. Keen to investigate whether this could sit on the same authentication portal as discussed above.	Shared procurement & development  Option for Bromley to join the existing CA project (above) and expand the portal to include other line of business services such as Adult social care	£220k additional work onto the same shared portal above
E-Forms System	No product at present. Looking to procure to offer enhanced forms functionality, support self service, and potential CRM integration.	Some basic e-forms but much development required and a Member priority. Want to see e-forms integrated with back office, payments and authentication systems via CRM	Shared procurement, development, and usage	£117k
On line Payment System	Currently using Capita e-Payments system. Looking to develop further to integrate with e-forms to support self service, and provide voice activate payment add-on.	With Capita at the moment and with limited payments available online as yet for customers. Use of voice activated payment for parking.	Shared development and usage	£50k
Cashless Payment System	No plans at present other than for parking payments for which soft market testing has been completed.	Piloting in parking but early days	Look at Lewisham Smart Card + Others.  Shared procurement, development, and usage  Potential for	£60k

			shared procurement of cashless parking.	
<b>Customer Relationship Management System &amp; Integration Into Back Office Line Of Business Systems</b>				
SMS/Messaging Broadcasting Tool	Not currently being progressed.	Already piloted SMS to notify customers of changes to waste collection over Christmas – keen to develop further.	Shared procurement, development, and usage	£80k
CRM	Currently using Comino v13.  Looking to procure new CRM to support web based Self Service and potentially further back office integration.	On version 4 of Microsoft Dynamics. A lot of development work already undertaken as part of our customer access programme including designing an infrastructure for back office integration. Would work well with a Microsoft CMS.	Potential future shared development, and usage. Potential for sharing the architectural design for back office integration.	£250k (based on an average CRM review)
Line of Business Connectors	Line of business system connectors in place between the Comino CRM and : <ul style="list-style-type: none"> <li>• Insight (Symology)</li> <li>• Uniform</li> </ul> <p>Currently looking at procuring NDL Metacybe to enable web based self service with the Comino CRM and an e-forms solution. Future integration between other systems will also be enabled.</p>	Line of business system connectors in place between our Microsoft CRM and: <ol style="list-style-type: none"> <li>2. Uniform</li> <li>3. Confirm</li> </ol> <p>We use an integration tool from NDL Metacybe called AWI to reduce costs of back office agents/integration – could be opportunities to share with Bexley.</p>	Shared procurement & development. Sharing of architectural design and development.	£90k
Voice Self Service	Currently implementing Avaya VoIP telephony system across the Council and Contact	Currently working with Telephonetics (Voice Recognition supplier) to implement the technology internally	May both be too far down the line on these solutions to be able to join	Costs already met



	Centre. System includes voice recognition to enable self service for switchboard and basic enquiries.	across the organisation. This will then be developed further to handle external calls after 3 months of satisfactory performance.	up.	
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**Shared Services/Property**

Feasibility study to be carried out to investigate options for co-location of a shared contact centre site	Both boroughs open to exploring shared property for contact centre.	£100k
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<b>1.8 Summary of Benefits by Type</b> Please tick one or more types of benefit that your project will deliver. You will have the opportunity to expand on this in Section 2.6.	<b>Tick as Appropriate</b>	<b>For further detail see Section 2.6.</b>
Cash Savings	✓	
Efficiency Gains	✓	
Cost Avoidance	✓	
Capacity Building	✓	
Performance Improvement	✓	
Customer Satisfaction	✓	
Other	✓	

## 2. Project Detail

### 2.1 How does the proposed project address one or (or more) of Capital Ambition's themes and funding priorities?

This proposal addresses several Capital Ambition themes:

**Connected London and Delivering Together**, by proposing investment into a shared web platform and other front-end customer contact systems to transform services and provide effective web-based services to residents, making it easier for them to do business with us and streamlining our back office processes.

The adoption of new technologies such as SMS and social media and their effective and efficient integration into line of business systems will further enhance the provision of cost-effective service channels.

It will also help both boroughs meet the challenge of finding new ways to engage communities aiming to, as Capital Ambition states, 'Create an environment where people are able to genuinely influence the decisions of local councils'.

Key learning and outcomes from this project, and any procurement frameworks in place, will have relevance and value to any further shared service work within and beyond the partner authorities and help to pave the way for greater capabilities across a range of services.

By also exploring options for co-locating the contact centres in a shared property between Bexley and Bromley, the feasibility of delivering efficiencies within both boroughs will be determined.

**Raising the Bar**, by improving performance across both councils, taking advantage of economies of scale and increased resilience by pooling resources. The proposed project will also provide an exemplar of the application of shared service principles, the use of proven and emerging technologies, standardised data capture and integration processes, and measurable outcomes and benefits.

The project also addresses **National Indicator 179** (value for money gains) and **National Indicator NI14** (avoidable contact).

Supports **National Improvement and Efficiency Strategy** themes of innovation, and Value for Money by aiming to develop the IT capabilities of both boroughs to provide services to residents in a modern and functional way, being driven by financial need

Supports the former Prime Minister's speech on the importance of the web for delivering public services in the future and the importance of investment in web technology. This speech broadly received cross political party support.

## 2.2 Who are the partners directly involved in running the project and what will they contribute to its success?

Please List partners:	How will they contribute to the success of this project?
<b>London Borough of Bexley</b>	Serving as a pilot borough for this transformation project, contributing resources to support the project and funding towards implementation.
<b>London Borough of Bromley</b>	Serving as a pilot borough for this transformation project, contributing resources to support the project and funding towards implementation.
<b>Capital Ambition</b>	Providing support, funding, and advice on best practice in other boroughs.

## 2.3 What are the intended outcomes of this project?

When considering intended outcomes, you need to ask the question 'What changes or effects should come about as a result of the project?'. Outcome statements typically start with words such as improved, increased, enhanced and reduced.

Outcome No.	Outcome Description
1	<p>Joint Bexley/Bromley web portal and other customer contact infrastructure investments will result in the following outcomes:</p> <ul style="list-style-type: none"> <li>➤ Efficiency savings of an approximate figure of £136,000 as described above.</li> <li>➤ Customer Access: Improved self-service functionality delivering a wider range and more complex services to customers through our website</li> <li>➤ Channel Shift: Increased take up of the web site reducing £ spent on more costly customer contact channels – phone and face-to-face</li> <li>➤ Improved Performance: Enhance performance against two major National Indicators NI179 &amp; NI14</li> <li>➤ Customer Service: Improve customer satisfaction through expanded range of services available 24/7. Ability for customers to track their requests and the increased options to feedback and comment on services through modern e-communications.</li> <li>➤ Customer Insight: Greater accuracy of information through improved data capture, validation, and sharing. With this information we can develop and shape services through greater understanding of need and target services.</li> <li>➤ Provides scalable (and green) solutions adaptable to other common service functions, leading to the above outcomes being extended to other boroughs</li> <li>➤ The promotion of digital and social inclusion through enhanced easily accessible customer contact points</li> <li>➤ Best practice that can be rolled out to other boroughs as well as lessons learnt</li> </ul>

2	<p>The possibility to go further in the future:</p> <ul style="list-style-type: none"> <li>➤ The feasibility study to investigate options for co-location of a shared contact centre will provide the first step in building up strong inter-borough relationships and exploring the possibilities around Shared Services. It will also greatly increase the potential to deliver integrated Bexley/Bromley face to face, back office functions and professional services in the future.</li> <li>➤ Develop business cases to pool resources where practical and sensible to do so.</li> <li>➤ Bromley and Bexley are in discussion about also using web technology to develop shared extranet technology to deliver a system of financial and performance management reporting. This would build on pre existing partnerships between Bromley and Bexley's finance Division.</li> </ul>
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## 2.4 What outputs will the project deliver?

Outputs (sometimes called 'deliverables') are tangible things that are to be delivered by the project e.g. toolkit, procedure manual, training strategy. Project phases are typically initiation, planning, execution and closure

No.	Project Stage or Phase	Description of Output	Target Completion/ Delivery Date	Cost £
1	Governance	1.1 Establish governance arrangements for the project.  1.2 Agree the borough working arrangements and resources e.g. project team involving officers from both boroughs.  1.3 Chief Executives to both sign off the governance arrangements	June/July 2010  June/July 2010	
2	Planning	2.1 Investigate and agree joint specification for requirements of shared web platform and other items of customer contact infrastructure.  2.2 Start the tender process on the items listed above.  2.3 Agree scope and methodology for feasibility study to investigate suitable property for shared contact centre.  2.4 Agree communications strategy.  2.5 Explore other options for shared services and undertake the necessary research and feasibility studies	Autumn 2010	
3	Implementation	3.1 Development and testing of new web platform and customer contact systems.  3.2 Staff training.	Spring 2011	

		<p>3.3 Launch new web platform</p> <p>3.4 Plan next phase for further web services – new e-forms etc</p> <p>3.5 Produce a report summarising opportunities for back office shared services and present to Chief Executives, Capital Ambition and another interested parties e.g. OLAs.</p>		
4	Closure of phase	<p>4.1 Review project against the PID and start to develop the further opportunities for greater partnership working through shared service delivery model</p> <p>4.2 Confirmation of costs and savings. Forecast net position and sign off.</p> <p>4.3 Review the operational benefits and agree mechanism to track and report progress.</p> <p>4.4 Key lessons learnt, processes used and other useful information disseminated to other boroughs.</p> <p>4.5 Consider opportunities for further joint work including shared professional services e.g. Trading Standards, Building Control etc.</p>	Summer 2011	
5	Final Outputs	<p>5.1 A shared web platform and other customer contact systems to deliver both Bexley and Bromley’s transactional services</p> <p>5.2 A plan for co-location of contact centres.</p> <p>5.3 A report recommending further areas where shared services can be taken forward. With a focus on the opportunities to join up back office services and reduce overheads.</p>	2011	

**2.5 How will outputs be rolled out beyond partners that are participating in the project?**

**Please describe how each of the outputs described above will be circulated, marketed and implemented externally.**

Output No.	Roll out strategy
1	Key lessons learnt, processes used and other useful information disseminated to other boroughs with scalable solutions.
2	Bromley are already joint tendering for their ICT contract and will continue to work closely with Lewisham who also are looking to further develop their web service offered to customers.
3	Bexley already have close working relationships with other boroughs including

	Wandsworth & Hammersmith & Fulham around web services work (please see Appendices). These relationships are expected to develop and include working together on additional projects in the future.
4	Bromley & Bexley will offer and accommodate peer review of the project from OLAs and facilitate visits to meet with key project leads.

**2.6 What benefits are sought from running this project?**

We need to understand what benefits are sought by running this project. You should complete the table below and be specific in terms cash savings (what, how much over what period?), efficiency gains (how, impact?), Cost avoidance (what, how much over what period?) and Capacity Building. The headings shown below are not exhaustive and additional headings can be added where necessary.

Benefit Heading	Description (what benefits?, how much?, over what period?, impact?)
Cash Savings*	<p>Exact cashable savings are not possible at this time and will always be dependent on customer take up of online services however web self-service is regularly flagged up as a key opportunity to make savings and to use technology to deliver core services to customers more efficiently. The cost differential between the three main channels of customer contact is huge, as illustrated by the latest figures from the <i>Channel value benchmarking service</i>.</p> <ul style="list-style-type: none"> <li>• Face to face £8.23 per visit</li> <li>• Phone £3.21 per call</li> <li>• Web £0.39 per visitor</li> </ul> <p>Source: Socitm <i>Insight</i> (December 2009)</p> <p>Those boroughs that have already gone down this road are reporting between 10% and 15% channel shift and based on the generic costings set out above that percentage channel shift would deliver considerable ongoing revenue savings given our high volumes of calls.</p> <p>For example Bromley receives around 800,000 calls into the call centre each year. If conservatively just 10% of these requests for a service went across to online self-service then the council could see savings in the region of £220,000. Bexley call volumes are similar and so would expect to see similar savings.</p>
Efficiency Gains	<p>Further efficiencies would be achieved by:</p> <ul style="list-style-type: none"> <li>➤ Sharing the initial capital investment costs which often make this kind of project prohibitive for boroughs to undertake individually.</li> <li>➤ Allowing service managers to remodel and streamline their service process around new online service delivery models - removing duplication and waste (lean thinking)</li> <li>➤ Sharing web resources to support and develop our joint web offerings.</li> <li>➤ Procurement framework to be scalable to other authorities.</li> </ul>
Cost Avoidance	<p>An integrated approach across Bexley and Bromley for this project will avoid an otherwise insular and probably more costly approach</p>

	<p>to individual systems and service enhancement. The joint approach and pump-prime funding will deliver a more robust enterprise-scale solution capable of delivering greater levels of optimisation and efficiency than individually developed / funded solutions.</p> <p>The ability for customers to track enquiries will further reduce avoidable contact as customer will not need to call in to find out what stage their service requests are at e.g. school admissions.</p> <p>Also general growth in service demand across the organisation (population growth, age profile etc) means unless e-services are provided we would need to add still further capacity to our Customer Contact Centres to deal with the increased volumes.</p>
Capacity Building	<p>Generating capacity will enable both boroughs to take forward the development of shared services and specifically web development more effectively than before.</p> <p>Greater automation will free up customer contact centre building capacity to deal with the more complex service requests such as social care assessments, planning information requests etc</p>
Performance Improvement	<p>Customer Insight will be much easier to capture and analyse for trends and to help both boroughs better respond to service need.</p> <p>It will also have a positive impact on addressing:</p> <ul style="list-style-type: none"> <li>➤ <b>National Indicator 179</b> (value for money gains)</li> <li>➤ <b>National Indicator NI14</b> (avoidable contact).</li> </ul>
Customer Satisfaction	<p>An increase in customer satisfaction is expected which should steadily increase as take up of self-service grows. Customers will find it easier to feed back on the services that they receive through online feedback forms.</p> <p>The recent LPSA survey headline findings show strong preference for web functionality from customer. Bromley have recently surveyed over 600 customers getting very strong feedback about the need for us to exploit the web further and provide a greater range of transactional services. 39% of those surveyed said more user-friendly forms would be the best improvement to customer services Bromley could make.</p>
Other	<p>The capability and coverage of web-enabled self-services in local government frequently lag behind those available in central government and the commercial sector. Greater adoption of self-service is now widely accepted as a key source of savings within local authorities. This project will serve a basis for local government best practice in this area.</p>

<p><b>2.7 What is the Equalities Impact of this project?</b></p>	<p>Improving self-service extends service provision to part of the local community which can not interact with the council during normal office hours.</p> <p>It also makes the provision of large font and foreign language information more accessible. Online self-service is better at meeting the needs of some people with disabilities i.e. mobility issues, hearing issues, etc.</p> <p>Concerns over sections of the community’s access to online services can be offset by the partner boroughs’ services for community access to online services. e.g. in all partner boroughs through Libraries and other contact points to cater for residents without computer access or skills.</p> <p>Equalities issues will be investigated as part of the project.</p>
<p><b>2.8 Legacy planning – What is the legacy of this project?</b></p> <p>Please describe how will the work undertaken during the running of this project will be sustained or carried on once the project has been completed.</p>	<p>The legacy of this project will be significant. The front office investment of improved front end integrated customer services capability will provide a step change in service provision, transforming how the councils interact with residents and will be sustained and developed further once the project has been completed.</p> <p>The investigation into shared contact centre locations will provide clear methods and programmes for implementation which will enable Bexley and Bromley to realise the benefits of shared services that will be scalable and can be adopted by other authorities.</p> <p>Provide best practice guidance to others considering similar projects and giving them confidence that both customer service can be improved and net savings achieved.</p>

**3 Project Resourcing**

**3.1 Have you secured or are you seeking match funding for this project? Yes**  
**If yes, please complete details of match funders in the table below:**

Funder	Amount (£)	Is Funding Secured?	Decision Date (if not secured)
LB Bromley	£250k	No	May 2010
LB Bexley	£250k	No	July 2010

**3.2 What is the anticipated CAPITAL spend profile of funding requested from Capital Ambition?**

Year	Quarter 1 (£)	Quarter 2 (£)	Quarter 3 (£)	Quarter 4 (£)	Total (£)
1	£0	£0	£83,333	£83,333	£166,666
2	£83,333	£83,333	£83,333	£83,333	£333,332
<b>Total</b>					£500,000

**3.3 What is the anticipated REVENUE spend profile of funding requested from Capital Ambition?**



Year	Quarter 1 (£)	Quarter 2 (£)	Quarter 3 (£)	Quarter 4 (£)	Total (£)
1					
<b>Total</b>					
<b>3.4 Project Staffing</b>		<p>Professional capacity will be generated to support the project, including project management, ICT and transformation expertise.</p> <p>To reduce costs, boroughs will contribute resources and use in-house expertise where possible. The boroughs will fully support the procurement, programme management and steering of the project. Further detailed discussions on staffing will be required and are part of the initial discussions around a governance structure.</p>			
<b>3.5 In Kind Contributions</b>		<p>Both authorities are committed to contributing existing equipment, office space, meeting rooms and staff where appropriate and are considering the funding of a joint project manager to accelerate this critical programme.</p> <p>To reduce costs boroughs will contribute resources and use in-house expertise where possible. Boroughs will fully support the programme management and steering of the project.</p>			

## 4. Project Planning

<p><b>4.1 What project dependencies were identified during the planning stage?</b></p> <p>Is this project on any other project or if any other projects are dependent on this project. If so, how?</p>	<p>There is clearly a relationship to the Capital Ambition funded project referred to at 1.5 above.</p> <p>Bexley is also carrying out an internal transformation programme 'Strategy 2014' which would be complemented by this project.</p> <p>Bromley also has its own 'Organisational Improvement Programme' which would also be complemented by this work</p>
<p><b>4.2 What key assumptions were made during the planning stage?</b></p>	<p>Some assumptions have had to be made around the detail of how a shared web portal will work but there is agreement in principle that this is a positive way to move forward.</p> <p>Key assumptions are based on a common vision for web based self-service across both organisations. Both Chief Executives have discussed this directly and are confident that an aligned approach exists between the two boroughs.</p>
<p><b>4.3 What constraints were identified during the planning stage?</b></p>	<p>The main constraints are obtaining the required take up of self-service, suitable technical solutions being available, a joint approach being agreed, appropriate buy-in and sufficient pump prime funding gained to accelerate the investment programme.</p>
<p><b>4.4 What is in the scope of this project and what specific exclusions have been identified?</b></p> <p>The scope defines what is within the boundaries of the project and what is outside those boundaries, particularly where there may be areas of doubt.</p>	<p>The development of a common online self service portal is in scope. All services where there is a valid business case to provide them online are in scope.</p> <p>Exploring the opportunities of further shared services is also in scope. However as yet this is exploratory work and no firm commitments can be made.</p>

**4.5 Key Risks**

Please use the table below to outline the key risks identified during the planning process. Key risks should be identified and graded according to likelihood of occurring (Probability – High(H) /Medium (M) or Low (L) and seriousness (Impact – High, Medium or Low). You should also define how risks will be minimised (Mitigating Actions).

Risk No.	Risk Description	Probability (L/M/H)	Impact (L/M/H)	Mitigating Actions	Responsible Officer
1	The savings resulting from the online services are dependent on customer uptake which may not materialise.	L	H	Actions to encourage take up will be implemented. Using RSS feeds, Alerts, and syndication to promote the availability of online services to customers. Estimated savings will be calculated for three different take-up level scenarios – optimistic (20%), realistic (15%) and pessimistic (10%).	Bexley / Bromley
2	The partnership cannot agree on governance arrangements and key decisions.	M	H	Early discussion between the partners to agree governance arrangements and practical issues that need early resolution such as procurement routes, hosting, and development options (including resourcing). Plus early identification of future decisions that will need to be made, in particular those that require a decision outside	Bexley / Bromley

				of the board governance, will be programmed into the board meeting schedule	
3	Pace of decision making and desire to implement a common solution differs between the partners (outside of the Board).	M	H	Board members to review and agree project terms as early as is feasible during this phase of the project, to plan ahead internal decisions and manage key internal stakeholders.	Bexley / Bromley
4	Staff / service providers become disaffected and disruptive as savings are realised.	M	L	Strong change plan and management processes in place within both boroughs.	Bexley / Bromley
5	ICT and other resources are not made available in a timely manner from the councils to support implementation.	M	M	The resource requirements will be outlined, and collectively determined in detail and agreed at the start of the programme and any impact on timescales will be assessed.	Bexley / Bromley
6	Wider stakeholders within each Council do not sufficiently buy into the changes, delaying or blocking the implementation.	M	M	Board members to work with key stakeholders to explain benefits and implementation plan, feedback issues and aid in the resolution.	Bexley / Bromley
7	Assumptions used to develop the project prove to be incorrect.	M	M	Board members responsible for validating that the assumptions used are appropriate.	Bexley / Bromley

**4.6 Project Key Milestones**

Please indicate key milestones for the project in the table below:

No.	Project Stage or Phase	Key Milestone	Target Completion/ Delivery Date	Responsible Office
1	Governance	<p>1.1 Establish governance arrangements for the project.</p> <p>1.2 Agree the borough working arrangements and resources e.g. project team involving officers from both boroughs.</p> <p>1.3 Chief Executives to both sign off the governance arrangements</p>	<p>June/July 2010</p> <p>June/July 2010</p>	Bexley / Bromley
2	Planning	<p>2.1 Investigate and agree joint specification for requirements of shared web platform and other items of customer contact infrastructure.</p> <p>2.2 Start the tender process</p> <p>2.3 Agree scope and methodology for feasibility study to investigate suitable property for shared contact centre.</p> <p>2.4 Agree communications strategy.</p> <p>2.5 Explore other options for shared services and undertake the necessary research and feasibility studies</p>	Autumn 2010	Bexley / Bromley
3	Implementation	<p>3.1 Development and testing of new web platform and customer contact systems.</p> <p>3.2 Staff training.</p> <p>3.3 Launch new web platform</p> <p>3.4 Plan next phase for further web services – new e-forms etc</p>	Spring 2011	Bexley / Bromley
4	Closure of phase	<p>4.1 Review project against the PID and start to develop the further opportunities for greater partnership working through shared service delivery model</p> <p>4.2 Confirmation of costs and savings. Forecast net position and sign off.</p> <p>4.3 Review the operational benefits and agree mechanism to track and</p>	Summer 2011	Bexley / Bromley

		report progress. 4.4 Key lessons learnt, processes used and other useful information disseminated to other boroughs.		
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A high level project plan will be established. The key milestones, objectives and dates are set out in sections 2.4 and 4.6 above. More detailed project plan covering each strand of work will be provided at the start of each phase of work.

## 5. Project Controls

### 5.1 Project Governance

The governance structure is in the process of approval between the two authorities. At present the two lead Directors meet on a regular basis and this will form the core of the project governance arrangements. The project board will include one representative from each borough. Each borough's Project Managers and officers will be identified as appropriate.

<p><b>5.2 Project Board Controls</b></p> <p>Describe how the Project board will exercise its control over the project, referring to the project governance diagram as appropriate.</p>	<p>The Project Board will meet regularly to review progress, sign off milestones, manage risks and resolve issues. Initial governance arrangements will be signed off by both Chief Executives.</p>
<p><b>5.3 Day-to-Day Controls</b></p> <p>Describe how the Project Manager will control the day-to-day running of the project.</p>	<p>The Project Managers will control day to day progress using standard project management practices in each partner borough. An overall programme manager will track progress across both boroughs and monitor progress against common milestones / outcomes.</p>
<p><b>5.4 Monitoring Procedures</b></p> <p>How will the project deliverables, costs and timescales will be tracked?</p>	<p>Standard project management practices will be applied as appropriate to ensure that progress is tracked and monitored. This will include monthly progress reporting, project planning, risk management and budgetary control.</p>
<p><b>5.5 Project Reporting</b></p> <p>Describe what reports will be produced for monitoring and control purposes.</p>	<p>A monthly highlight report will be completed using the standard Capital Ambition Project Highlight Report template. In addition all key milestones will be supported by a formal report and sign off process.</p>
<p><b>5.6 Escalation Procedures</b></p>	<p>The escalation procedures for dealing with deviations from plan, which exceed the authority of</p> <ol style="list-style-type: none"> <li>the Project Manager. Refer the issue to the programme board for resolution.</li> <li>the Project Board. Refer the issue to the project sponsor and the senior management representative of the relevant partner borough(s).</li> </ol>
<p><b>5.7 Risk and Issues Management</b></p>	<p>A full risk and issues log will be maintained and reported regularly to the Project Board. It will made available on request to Capital Ambition at any time during the lifecycle of the project.</p>
<p><b>5.8 Measures of Success</b></p> <p>Please describe the measure(s) that will be used to indicate that the project has been successfully completed.</p>	<p>At each deliverable/milestone a report will be produced and formally signed off. This will include a clear statement of progress against the target outcomes. At the end of the project the penultimate milestone is to review the project against its outcomes.</p>
<p><b>5.9 Communications Strategy</b></p> <p>How you will be managing project communications throughout the lifecycle of the project?</p>	<p>The London Borough of Bexley has an existing communications strategy as part of its Strategy 2014 transformation programme. This will be expanded to include the scope of this project. Communication will be in the form of events and published web content. A communications strategy will be agreed with Capital Ambition at the start of phase 6.</p>
<p><b>5.10 Lessons Learned</b></p>	<p>A “lessons learned” log will be kept and shared with others who may plan to run similar projects. A project closure report including lessons learnt will be produced and can be disseminated at any suitable point during or after the project.</p>

**5.11 Partner Authorisation**

Please indicate approval and acceptance of this proposal by the Project Board and Partner organisations participating in this project.

No.	Organisation Represented	Name	Signature	Date
1	London Borough of Bexley	Paul Moore		
2	London Borough of Bromley	Mark Bowen		

Thank you for completing this proposal.

We are happy to receive a copy by email to the Capital Ambition Programme Management Office – [CA-PMO@londoncouncils.gov.uk](mailto:CA-PMO@londoncouncils.gov.uk)

Please sign and send hard copy to (and for further information):

Capital Ambition Programme Management Office  
Capital Ambition  
London Councils  
59½ Southwark Street  
London  
SE1 0AL

Signed.....Date.....

Print Name .....Position.....

**Before submission please ensure this proposal has the support of the Chief Executives of all joint-proposers, and where appropriate Elected Members.**