



INVITATION TO TENDER - SUMMARY

CUSTOMER SERVICE UNIT

Part A

- a) Consists of a general introduction and instructions about how to complete the Tender. It provides general information about Freedom of Information and Insurances and details how the bids will be scored and the detailed criteria that will be used to evaluate the bids.
- b) It states that the contract is initially for four years with provision to extend for an additional six subject to satisfactory performance
- c) This part of the specification is around 20 pages long and is guided by strict procurement regulations.

Part B

Is where we describe the service and what the Council is trying to achieve in more detail.

- a) Part B identifies the three priority areas that the Contract will focus on:
 - Call Centre
 - Face to Face
 - Customer Relationship Management System
- b) The Council clearly states that Transfer of Undertakings (Protection of Employment) regulations 2006 (TUPE) does apply to this Contract.
- c) The Council is seeking an approach that:
 - Reduces the costs of running the Call Centre and Face to Face operation
 - Delivers increased accessibility for our Customers through multiple channels and multiple locations whilst improving the experience and service our Customers receive;
 - Reduces the number of contacts by telephone and Face to Face through reducing avoidable contact, repeat calls and expanding 'Self-Service' provision

- Establishes the best locations for delivering services
- Drives efficiencies, increases productivity and improves quality.
- Supports economic development through the training, development and employment of local people
- Establishes a model where Customer Insight and Business Intelligence are at the heart of how we deliver services;

d) Call centre

The Call centre handles Customer enquiries via the telephone. Enquiries are diverse in their nature and cover the range of services that are delivered by the Council as well as dealing with other enquiries that may relate to other agencies or the County Council.

The Call centre is a multi-skilled mixed working environment and the Customer Service Representatives are also trained to support the Face to Face operation as and when required.

e) Face to Face

The three Customer Service Centres are based in Hemel Hempstead, Berkhamsted and Tring. Enquiries are diverse in their nature and cover the range of services that are delivered by the Council as well as dealing with other enquiries that may relate to other agencies or the County Council.

The Customer Service Centres are a multi-skilled mixed working environment and the CSRs in the Customer Service Centres also support the call handling as and when required.

f) General Comment

The DBC approach in the CSU uses a different model to many local government operations which are only set up to give out information and act as an enhanced reception or information service. The Council does not wish to change this approach and wishes to enhance the Customer experience through more first contact resolution. It should be noted that it is by exception that enquiries that cannot be answered by the CSR and on a minimal basis they will refer or transfer Customers to the back office where agreed with the service.

The purpose of the CSU operation is to take on the Customer facing activity to allow the back office (service areas) to focus on the more critical areas of their roles.

g) Customer Service Representatives (CSR)

All CSR's are trained and developed to be multi-skilled across all services, this takes time and places a risk on the service should staff leave or transfer from the team.

The CSR's are knowledgeable across the breadth of Council services and trained in Face to Face and call handling skills, in addition they support the cover of reception. Each day the front line team have to be prepared to deal with a range of Customers who may be angry, distraught or have personal challenges e.g. mental illness, homelessness, etc.

The local knowledge of the individuals and the team will ensure that Customers who have enquiries not directly relating to the Council are suitably directed to partner agencies. Often the role of the CSR is to facilitate a resolution to a Customer's enquiry between different agencies. It is recognised that other approaches to service delivery and resourcing may be required to meet future demand

Receptionists

DBC has a reception at Hemel Hempstead Civic Centre that is resourced from the CSC staff.

Receptionists undertake duties that include signposting, security pass issue and informing hosts of visitors presenting at the reception desk. CSRs cover the main reception desk to support breaks, sickness, annual leave and training. The Receptionist directs Customers who wish to leave documents, packages and other items including garage keys, samples (environmental health), etc. for onward distribution to individual Council officers or service areas.

In addition the Receptionists take calls from internal staff and overflow calls from the Netcall virtual operator. They also issue temporary access fobs / passes for staff that have mislaid the originals and liaise with facilities management on matters such as key access, room issues, etc.

Customer Service Support Officer (CSSO)

The fast track aims to triage the Customers waiting in the Hemel Hempstead Customer Service Centre and where possible the CSSO will resolve the enquiry and will handle payments and Dacorum Card enquiries; otherwise they will assist the Customer in obtaining the correct ticket to achieve the best outcome for the Customer.

The CSSO supports Customers accessing the on-line housing application, changes and enquiries. The CSSO also covers a range of administration duties.

An important aspect of the role is to be alert to Customers entering the CSC who are on the cautionary database and will alert CCTV and if required defuse potential hostility.

Senior Managers (SM)

The role of the SM is to manage the staff, recruitment, performance management, resourcing & capacity planning, forecasting, service planning and reporting. They are

responsible for making sure each location is fully staffed and for adherence and compliance within statutory and local policies.

Team Managers(TM)

The TMs are a key point of escalation for the staff for Customer enquiries and liaison with the service areas on day to day issues and regular training, coaching and mentoring. Supporting SM on delivery of all staff related activities and real-time resource planning.

Customer Insight Project Officer

The Project Officer role is to gain insight and understanding of the needs and preferences of our Customers and communities. This is achieved by utilising analysis of a variety of data sources, through Customer consultation, Customer segmentation, surveys and mystery shopping to support the Council in shaping service delivery to improve efficiency of services, whilst enhancing access channels. Working with, and supporting Members and services to understand and action data, developing intelligence and interpreting that link intelligently

The ultimate objective of Customer Insight research is to reduce the costs of service delivery to the Council and increase access, convenience and satisfaction for our Customers. The establishment of service agreements between the service areas and Customer facing teams is formalised through quality standards and key performance indicators.

h) Challenges impacting on the CSU

The Council will be facing a number of challenges over the next four years and these will have an impact on the CSU operation, processes and contact volumes. These include:

- **Savings**

DBC faces significant challenge to reduce costs and to work within tight budget constraints and this contract must make savings over the life of the contract

- **Redevelopment of Hemel Hempstead Civic Centre**

The Council will be relocating temporarily from its Civic Centre to an interim location in 2014/15 - this will impact the Call Centre and Face to Face operations

- **Universal Credit**

The introduction of Universal Credit (UC) will have a range of significant impacts.

- **Welfare Reform Act and Local Government Finance Reform**

In line with the governments welfare reform act various changes are due to take effect in April 2013:

- Housing benefit entitlements for working age people in the social sector will reflect family size.
- Housing benefit awards will be reduced to 90 per cent of the initial award after 12 months for claimants receiving jobseekers allowance.

These changes may impact the CSU as benefits claimants seek further information regarding changes to their entitlement.

- **Housing Repairs Re-Procurement**

The Council intends to re-procure its housing repairs Contract. This will also include changes to how housing faults requiring repair are reported. The expected date this would take effect is April 2014, where these calls would transfer out of the CSU to the new housing repairs provider.

- **Dacorum Borough Council – Programme of Activity**

The Council is undertaking a major transformation programme over the next four years.

i) Service Requirements

- **Call Centre and Face to Face**

The Call Centre, Face to Face and new Self-Service Channels should be provided to a high standard of accessibility.

- **Council Documentation – Easy to Understand**

An initiative is underway to review and improve our communications to Customers to support channel shift and avoidable contact initiatives.

- **Business Continuity and Disaster Recovery**

It is essential that the Call Centre and Face to Face operations maintain continuity of service and it is a requirement to ensure robust Business Continuity and Disaster Recovery plans are in place including alternative locations to deliver services.

- **Development & Accreditation**

The Council prides itself in having knowledgeable and professional staff dedicated to the delivery of excellent CustomerService Centre operations. Opportunities for staff to achieve a Vocationally Related Qualification and for the wider operation accreditation from an industry recognised body in Customer Service would be beneficial. The continual professional development of managers and staff is also important

j) Service Outcomes

Innovation and Improvement Projects

The Council is seeking:

- novel and innovative ideas and methods of service delivery;
- a model where services are built around Customer needs; where Customers have choice and convenience in the way they interact with the Council Channel Shift
- introduction of a CRM system.

Project 1 - Efficiency Savings through Channel Shift

It is important to the Council to provide Customers with other channels and self-service locations.

- **New In Person Model and implementation of Self Service Locations**

The development of Self-Service will be supported by a wish to increase the number of places in our communities that Customers can access Council services, e.g. community centres, libraries, other public accessible locations. The Council recognises the need to provide assistance in these locations to support the Customers Self-Serve transactions and initially knowledgeable CSC staff will be on hand to provide that support.

Project 2 - Customer Relationship Management

The outcome for the Council is to create an environment where CRM is embedded in the culture of the Council. The Council seeks to

- Provide a single view of the customer with ability to view and action on one screen “core details” to assist staff in viewing previous Customers status /interactions
- Provide Customer Insight, Business Intelligence and reports e.g. builds a picture of the individual Customers,
- Reduce the need for operators to open up a number of systems (single sign on) or the need to double key data,
- Act as a contact and information database to support knowledge management, monitoring and reporting.

m) Customer Insight & Business Intelligence across the Council

The Council is continually seeking to improve its services and knowledge of where Customers are experiencing continued service failure, anti-social behaviour or lack of access to services will be invaluable to achieve efficient and effective solutions.

n) Single Sign On

The Council requires the Tenderer to create a ‘single sign on’ so that CSRs do not have to open and operate multiple systems

o) Introduction of a Knowledge Management System (KMS)

A KMS also has the benefit of communicating, in real time; with CSRs any emerging issues in service delivery e.g. refuse vehicle breakdown and subsequent missed collections.

p) Location of Operations

- **Location of Call Centre Operation**

The Call Centre operation is required to be delivered from the current location until the relocation of Hemel Hempstead Civic Centre. Provision will be made for the Call Centre in the temporary premises and in the new building in 2016.

The Council would be open to the co-location of other local authority call handling within its premises and would seek a share of any benefits from such co-location. It is important to the Council to have skilled staff with local knowledge in the call centre and where possible retain jobs locally.

The Council is open to proposals throughout the contract term to review proposals to relocate the call centre operations to an alternative location. However this would be subject to a detailed cost benefit analysis and would be subject to a separate Cabinet decision.

- **Location of the Face to Face operations**

The Tenderer must deliver the Hemel Hempstead CSC from its current location; Space is being planned for the Hemel Hempstead Customer Service Centre (CSC) operation in the temporary location in the Marlowes and the CSC will be located in the new PSQ premise in 2016.

q) Performance Measurement Framework (PMF)

The operation will be measured by a performance framework. This will include measures:

PMF1	Performance (speed of answer, wait times, lost calls / abandoned calls, etc.)
PMF2	Key Performance Indicators (accuracy, quality, transfer rates, alignment to SLA and technical competence)
PMF3	Channel Management (Channel Shift)

Ten per-cent of the gross Contract value will be ring fenced for the Performance Management Framework

THIS CONCLUDES THE SUMMARY OF PART B OF THE INVITATION TO TENDER.

The full part B document is 45 pages long.

The rest of Invitation to Tender includes the Terms and Conditions of Contract, Part C and Part D.

The Terms and Conditions of Contract

This is the legal framework and conditions that make up the contract. It includes provision, amongst many other things, about:

- Payment
- Licences
- Warranties
- Data Protection
- Confidentiality
- Governance
- Change Control
- Equalities
- Health and Safety
- Leases

It includes detail about how the contract will be managed and run and what standards are expected and legally enforceable.

The terms and Conditions of the contract runs to over 170 pages and has been compiled by the Council's commercial legal advisors.

Part C

This is the part of the document that has to be completed by bidders. It is this part of the contract that will be evaluated by the evaluation team. It requires:

- a detailed financial breakdown of the bidder's bid which includes costs to undertake the innovation projects, overhead costs, profit margin and capital costs
- An explanation of how the bidder is intending to make improvements and cost savings and explains marks will be awarded in this area
- 'Technical Merit' – how they will support the Council's aims and ambitions including detail about their proposed operation
- 'Aesthetic and Functional characteristics' – how they will make changes to reduce avoidable contact achieve single sign on, etc
- 'Technical Assistance' – what ICT systems they will be running and how they will be supported
- 'Quality' – Introducing a KMS, continuous training and development, etc

This is a very detailed and involved part of the ITT. The 100% of the marks that can be awarded will be split so that costs / price / finance issues can only cover 40% of the marks and the quality aspects will be allocated 60% of the marks

Part D

This part of the ITT includes all the appendices that they will need to make their judgements and includes: structure charts; job descriptions; systems lists; etc

The invitation to tender is due to be completed by bidders and returned to the Council by 20th December 2012.

Any questions or clarification: Dave Gill x2511 – Room 137 – or e mail david.gill@dacorum.gov.uk