# Committee: Cabinet

# Date: 9 March 2015

Agenda item: Customer Contact Programme Contract Award

Wards: All

# Subject:

Lead officer: Caroline Holland, Director of Corporate Resources

Lead member: Cllr Mark Allison, Deputy Leader and Cabinet Member for Finance

Contact officer: Sophie Ellis, Assistant Director of Business Improvement

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**Recommendations:**

A)  That Cabinet approves the award of a contract to Organisation A for the provision of:

   a.  technology and associated services for the Customer Contact Programme, incorporating:

      i.  a refreshed website and content management system that facilitates an increase in online self-service transactions;

      ii.  a customer account facility that facilitates easier online, face to face and telephone interaction between customers and the Council;

      iii.  an upgraded contact management solution, including appropriate integration with existing line-of-business systems, to allow more customers to complete their transaction in a single visit and reduce avoidable contact.

   b.  a replacement electronic document management system and associated services.

   The contract will commence on the 2 April 2015 and be for a period of three years with the option to extend (exercisable at the Council's sole discretion) by three further increments of 12 months each. The maximum possible contract period would be no more than six years.

B)  That Cabinet delegates authority to the Director of Corporate Services to procure additional services offered within the contract.

C)  That Cabinet delegates authority to the Director of Corporate Services to approve any final amendments to the Customer Contact contract as may be agreed during the Preferred Bidder stage.

D)  That Cabinet delegates to the council's Director of Corporate Services the decision to extend the contract by three further increments of 12 months each as detailed in recommendation A.

E) That Cabinet approves the procurement of scanners in accordance with the council's Contract Standing Orders as part of the programme as set out in item 10.10.

F) That Cabinet approves the procurement of system integrators (APIs) in accordance with the council's Contract Standing Orders as part of the programme as set out in item 10.11.

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## 1. Purpose of report

1.1 The purpose of this report is to seek the approval of Cabinet to award a contract for the provision of technology and associated services as part of the Customer Contact Programme.

1.2 The contract comprises two overarching elements:

   a) Technology and associated services that enable the council to realise the aims of the **Customer Contact programme**, namely:

      i. increase the potential for customers to request and pay for services through a refreshed website;

      ii. allow customers to have their own online 'account' so they can track their queries and interactions in a single place; and

      iii. permit staff to manage and process queries and requests quickly and easily.

   b) A replacement for the Council's current **electronic document management system** (EDMS), SMART, and associated implementation and data migration services.

1.3 This report makes a recommendation that Cabinet agrees to the award of contract to Organisation A.

## 2. Executive summary

2.1 In July 2012 Cabinet approved a programme of work to pursue a channel shift strategy and implement and promote customer self-service.

2.2 In March 2013 Cabinet approved Merton's Customer Contact Strategy which articulates the council's intention to increase online access to services, encouraging customers to self-serve where possible, and reduce avoidable and repeat contact by responding to as many customer queries as possible at the first point of contact.  This will not only improve customer experience, it will allow the organisation to operate more efficiently – critical in the face of a reducing financial envelope.

2.3     In February 2013 Cabinet approved a project to replace the council's existing electronic document management solution as the existing legacy system is not fit for purpose.  The aim of the replacement system is to ensure the council meets its requirements under the Data Protection and Freedom of Information Acts, reduce the risk of data loss and misuse (and thus fines from the Information Commissioner), to support shared working and remote working initiatives by making data and documentation available virtually, and to automate business processes to increase efficiency.

2.4     It was agreed that both solutions should be jointly procured; the council's Procurement Board determined that a competitive dialogue procurement exercise would be appropriate given the complexity of the solution and the maturity of the market.  This procurement procedure comprises of a number of stages whereby bidders put forward increasingly detailed submissions for evaluation following meetings (or 'dialogue') with the procuring agent to refine their understanding of the requirements.  Bidders are deselected through the process at each stage.

2.5     Whilst this is a longer procurement process than others it ensures that the procuring agent benefits from market intelligence and expertise in the refinement and development of their requirements and for bidders to fully understand the outcomes that the procuring agent is looking to achieve.

2.6     The competitive dialogue process began with an advert in the Official Journal of the European Union in July 2013 and concluded with the submission of two final tenders on 10 February 2015.  The evaluation at each stage is set out in this report.

2.7     Approval from Cabinet is sought to proceed to Preferred Bidder stage and award a three-year contract to Organisation A.

2.8     The contract will provide the council with a refreshed website that increases the potential for customers to request and pay for services online; the ability for customers to have an 'account' that allows them to track their queries and interactions in a single place online; and a contact management solution that allows staff to manage and process queries and requests quickly and easily and which is integrated with the relevant back office systems.

2.9     The contract will also introduce a replacement corporate electronic document management solution to be implemented in the service areas set out in item 4.6 of this report.

2.10    This is recognised as a significant investment for the council.

2.11    Research undertaken in 2014 into the preferences of Merton's service users indicates that Merton residents have a high propensity for online access and self-service and a preference for online transactions.  The introduction of the technology incorporated in this contract, therefore, responds to the desire of many Merton residents to access services via the internet.  For those who still wish to use other forms of contact, the ability to have their query dealt with at the first point of contact will improve their experience of public services.

2.12    Equally importantly, the technology and services this contract procures are important enablers for achieving the ambitions set out in service target operating models (TOMs) and underpin a number of savings already set out in the Medium Term Financial Strategy.  These are set out in more detail in Appendix A of this report.

## 3.     Background and context

3.1    The way in which Merton borough residents and service users want to access services is changing.  People who routinely buy services and goods over the internet and by phone, and who communicate via SMS (text messaging), Facebook and Twitter increasingly expect the same sort of flexibility when accessing public services.

3.2    Our residents' survey demonstrates that Merton's residents already use a range of different access routes into council services and the preference for online access is increasing year-on-year.  Younger residents in particular no longer want to come to council offices but instead prefer to use the web, e-mail and SMS when contacting the council.

3.3    People are also increasingly expecting public services to be delivered in an holistic way and that the council is proactive in interpreting their requirements and responding to them swiftly.  When someone contacts the council they expect that there is a coherent and complete 'view' of them within the organisation – this is their experience of other organisations so why not the council?  Customers do not want to speak to several different departments and service teams about the same issue, which means that services can no longer afford for their business systems and their relationships with customers to exist in isolation.  For the sake of good customer experience, and effective and efficient services, a single, comprehensive view of customers across the organisation is needed.

3.4    In parallel with this, and in the context of a very difficult financial climate, local authorities in general are having to find ways to spend less money on service delivery and be more efficient – especially at the point of contact with the customer. Two effective ways to reduce the cost of services are firstly to resolve queries and requests from service users first time round (to reduce unnecessary officer time spent revisiting the same query); and secondly to help people do what they need to do quickly online or, if they have one, through their smartphone so they don't have to contact the council at all.

3.5    It is in this context that Cabinet approved, in July 2012, a programme of work to pursue a channel shift strategy and implement and promote self-service.

3.6    The report that Cabinet considered in 2012 and which proposed the programme of work included a recommendation to procure and implement a specific Customer Relationship Management product.  A number of factors subsequently led officers to revisit this particular recommendation, having concluded that the stated product would not meet the council's needs.

3.7 The Overview and Scrutiny Commission met and considered the proposal shortly after the Cabinet decision and raised a number of concerns, including that there was insufficient justification for moving to the product proposed in the report and that it would be inappropriate to use a sole supplier without a formal tender exercise. The Commission also asked officers to ensure adequate attention was given to managing the cultural change that the programme of work entailed.

3.8 In response to the concerns raised by the Commission, the Procurement Board reviewed the proposed approach and, in October 2012, determined that a full OJEU procurement process would be required. Following a period of market engagement the procurement board agreed, in February 2013, that a competitive dialogue process should be undertaken, with a gateway review after an initial market engagement day in order to validate the approach.

3.9 This change in procurement approach required that the council articulate in much finer detail its requirements in terms of technology (i.e. produce a tender specification). This provided the council with a welcome opportunity to test the outcomes it wished to achieve through any new technical solution and avoid the inherent danger of being IT-solution-led in its approach to what is, in effect, a cultural and service transformation programme. One of the outputs of this work was the development of the Merton's Customer Contact Strategy, approved by Cabinet in March 2013.

3.10 The Customer Contact Strategy cements the council's approach to meeting the changing needs of residents and service users. It focuses on increasing online access to services, encouraging customers to self-serve where possible, and reducing avoidable and repeat contact by responding to as many customer queries as possible at the first point of contact. This will not only improve customer experience, it will allow the organisation to operate more efficiently – critical in the face of a reducing financial envelope.

3.11 The strategy provides a set of clear outcomes and it is these that underpin the requirements that the technology to be delivered through this contract will meet. As noted above, this incorporates a refreshed website that increases the potential for customers to request and pay for services online; the ability for customers to have an 'account' that allows them to track their queries and interactions in a single place online; and a contact management solution that allows staff to manage and process queries and requests quickly and easily and which is integrated with the relevant back office systems.

3.12 For clarity, Cabinet will want to note that the technology and services this contract will secure are critical to the realisation of its Customer Contact Strategy.

## 4. Electronic document management (EDM)

4.1 In February 2013 Cabinet approved a budget of £1.2m for a replacement electronic document management system (EDMS) and agreed that it would be procured as part of the Customer Contact competitive dialogue exercise. This was felt to offer a procurement route that would ensure best value to the authority.

4.2    The EDMS currently used by the council (SMART) fails to meet business need due to a number of chronic issues relating to functionality, compliance with relevant legislation and ease of use.  Whilst the council has the option to upgrade to a later version, there is no indication that this would resolve these issues and the upgrade would be more costly than the replacement solution that is proposed as part of this contract award.

4.3    In making the decision to replace the current solution (rather than simply retire the existing solution and operate without any corporate EDMS) Cabinet will recall that they took account of the following business benefits a corporate EDMS brings to the authority:

4.3.1.    More responsible ownership of information: reducing the risk of lost and mislaid documents – and the consequent likelihood of a fine from the Information Commissioner – and enabling the organisation to meet its requirements under the Data Protection and Freedom of Information Acts.

4.3.2.    Improved version control and automated document deletion/retention: reducing the level of duplicated documentation currently stored on the Councils servers and in storage facilities and office space (and costs associated with these).

4.3.3.    Automatic redaction functionality ensuring personal data is not displayed publicly and thereby protecting the council from a fine by the Information Commissioner.

4.3.4.    Improved e-mail management: making visible a wealth of council owned data that is currently stored in, what are effectively, stand-alone Outlook folders to which only individuals have ready access. This is a critical consideration in relation to data transparency and evidence-led business execution.

4.3.5.    Improved support for collaborative working and multi-location initiatives, such as shared services: by allowing documentation to be accessed from any physical location.

4.3.6.    Quicker identification, location and retrieval of documents, ensuring that the council makes full use of data as assets to enable sound business execution and decision making.

4.3.7.    Automated workflow management to speed up business processes and enable cost efficiencies to be realised.

4.4    Perhaps even more critically, however, the absence of document imaging and electronic storage would inhibit the ability of the council to transform its services and deliver the necessary efficiencies and financial savings that it needs to achieve in the future. An EDMS is a critical dependency to at least two of the council's highest priority improvement programmes:

4.4.1.    Flexible and mobile or remote working: alongside the planned changes to equipment and working culture, it will be necessary to implement the technology needed to enable officers to access and update information necessary to their function from any location electronically.

4.4.2.    Customer Contact: enabling resolution to customer issues at the first point of contact will require quick and easy access to a range of documentation across a range of services. Migration to self-serve will demand that customers themselves also have similar access.
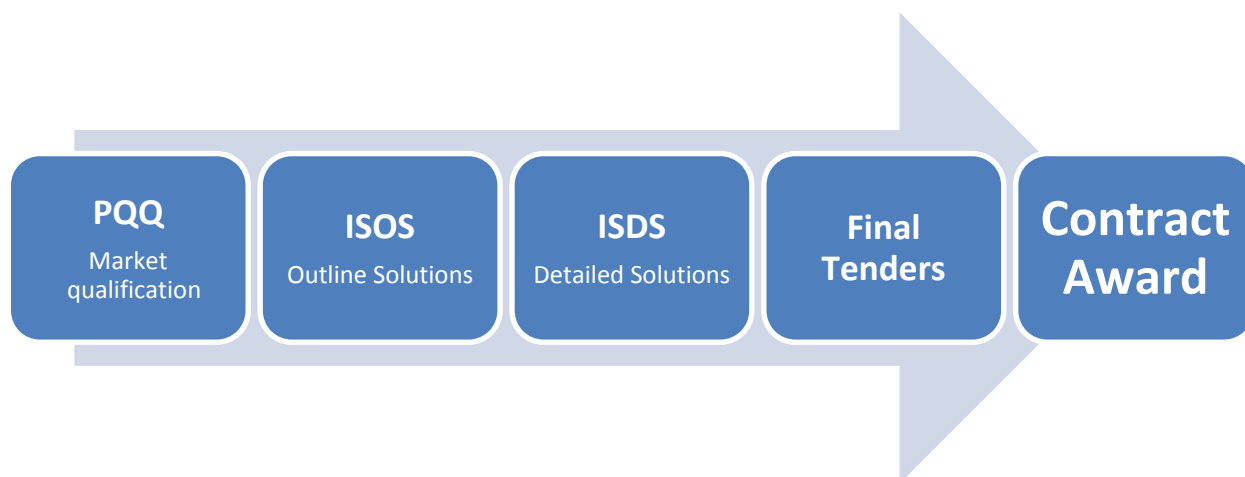
4.5     Finally, but significantly, the availability of EDMS is an important factor in the overarching transformation of the organisation as part of the Outstanding Council Programme. There is a clear commitment to a high standard of professionalism and the streamlining of work processes so that they are efficient and not unnecessarily bureaucratic. It is essential that officers are supported to make this transition and enabled to continue providing high quality services to customers in a constrained economic environment. It is also essential that the organisation is able to respond effectively to the changing needs of service users.

4.6     The proposed contract therefore incorporates the technology and associated services to implement a replacement EDMS (MS Sharepoint) that meets the council's requirements.  The scope of implementation of the new solution under this contract will extend to the following service areas:

- All services currently using the existing SMART system:
  - HR
  - Pensions
  - Post Room
  - Transport and Infrastructure (i.e. Parking)
  - Ad hoc improvement projects

  (Note that SMART also holds CSF social care documents but these are to be migrated to the new social care information system).
- Service areas that are within scope for implementation of the Customer Contact solution where this is required for self-service.
- Housing
- Planning
- IT support and service teams

4.7     Wider implementation of the solution into other service areas will be undertaken on a case-by-case basis and based on robust business cases that demonstrate measurable financial and business benefits.

## 5.     Procurement Process

5.1     As noted in item 3.8 above, the council's Procurement Board determined that the most appropriate procurement approach was competitive dialogue.

5.2     The tendering process was carried out strictly in accordance with the council's Contract Standing Orders and in accordance with the Public Contracts Regulations 2006 and the EU Procurement Directive 2004/18/EC, using the competitive dialogue procedure. This process focuses on intense engagement with providers, i.e. "dialogue". There is a policy of reducing the number of providers through the various stages of procurement.

5.3     Whilst this is a longer procurement process than others it provides a framework for the procuring organisation to enter into dialogue with a small number of providers who qualify to provide the relevant services.  This enabled the council to develop their requirements iteratively in consultation with these specialist bidders, resulting in a solution that delivers well developed outcomes for the council and benefits from the expertise and experience of market experts.

5.4 The tender was managed via the council's web based Electronic Tendering System Pro-Contract. The exercise was carried out and supported throughout by the Corporate Procurement Team with additional external expert support and advice to ensure a robust approach that adopted good practice. Advice was also provided by the Council's Legal Services as needed.

5.5 The competitive dialogue process is comprised of the following stages:



| **PQQ** Market qualification | **ISOS** Outline Solutions | **ISDS** Detailed Solutions | **Final Tenders** | **Contract Award** |

5.6 **Stage 1 (Pre –Qualification Questionnaire):** Organisations who express an interest are invited to submit a completed Pre-Qualification Questionnaire and supporting documents. Evaluation selects an agreed number of candidates (the highest scoring) to proceed to the next stage.

5.7 **Stage 2 (Invitation to Submit Outline Solutions):** The organisations selected at stage 1 are invited to submit an outline proposal for the service which is subsequently evaluated against pre-determined method statement questions. There is no financial evaluation apart from a requirement that bidders confirm they are able to meet the specified affordability requirement. Evaluation selects an agreed number of candidates (the highest scoring) to proceed to the next stage.

5.8 **Stage 3 (Invitation to Submit Detailed Solutions):** The organisations selected at stage 2 are invited to submit detailed solutions, including financial information for evaluation. Evaluation selects an agreed number of candidates (the highest scoring) to proceed to the next stage.

5.9 **Stage 4 (Call for Final Tenders (CFT)):** This is the final stage of the process and is the point at which the Council receives tenders which are capable of acceptance. All legal, technical & financial matters have been dealt with.

5.10 **Stage 5 (Contract Award):** A preferred bidder is appointed to deliver the Services.

5.11    In between stages two and five, bidders within the process engage in dialogue with the procuring agent.  This takes the form of pre-arranged, confidential meetings between individual bidders and the procuring agent to discuss both the requirements and the solutions that bidders are developing.  The outcome is that the requirements are refined and clarified through these discussions (in the context of current market developments) and bidders' proposals are more responsive.

## 6.      Evaluation of Customer Contact bids

6.1     See additional information in Confidential Appendix C.

## 7.      Alternative Options

7.1     This procurement exercise followed an independent appraisal of options and technology review undertaken by BDO Ltd upon which the Cabinet report in July 2012 was based, and therefore the decision by Cabinet to pursue a channel shift and self-service strategy.

7.2     Feasible and cost-effective alternatives for the technology have been explored as part of the competitive dialogue procurement process, ensuring the council is able to identify the solution which best meets its requirements in terms of cost and quality.

7.3     Should Cabinet decide not to award the contract, the implications are as follows.

7.4     Firstly the ambitions of the Customer Strategy agreed by Cabinet in March 2013 could not be realised.

7.5     Secondly, the issues relating to the management of documents as set out in item 4 above would not be addressed, and this would have further implications for the Council's Flexible Working programme and associated savings, since this relies on the availability of data and documents for remote staff working.  The council would need to explore an alternative document management solution as upgrading the current SMART solution would not meet its requirements.

7.6     Thirdly, the realisation of a number of service target operating models (TOM) are dependent upon the availability of the technology and services offered through this contract – in particular those in Environment and Regeneration and the customer facing elements of Corporate Services where channel shift is a significant element of the future operating mode.  In other areas of the council, this relates more to mobile and flexible working, which will be enabled through mobile technology and electronic document management.

7.7     Finally, and linked to the previous point, the technology and services offered underpin the Medium Term Financial Strategy since a number of agreed savings are either directly or indirectly dependent upon the infrastructure it offers.  For clarity Appendix A identifies some of these.

## 8. Consultation undertaken or proposed

8.1 Comprehensive research was undertaken in 2014 into customer interaction and preferences in Merton in order to determine the appetite amongst Merton residents and service users for self-service.

8.2 The results of this research indicates that Merton residents have a high propensity for online access and self-service, with 66% of the local population having a high likelihood to self-service which can be contrasted with only 5.9% stating they are actively non-receptive to the internet. The analysis pointed towards a preference for transactions online as opposed to face to face, with 24.3% of Merton's residents actively preferring the internet as a service channel.

8.3 The preferred bidder has undertaken within their tender to ensure that residents and end users continue to shape and influence the development of the technology.

8.4 The governance arrangements for the programme are designed to ensure that services across the organisation are fully engaged in the development of the approach.

8.5 Governance for the programme consists of a Programme Board (management and control focus) chaired by Caroline Holland, Corporate Services Director (programme sponsor) and including representation from each of the departments. The programme also reports monthly to the Merton 2015 board which draws its membership from across the organisation.

8.6 A draft ownership and communication plan has been developed and service and customer groups will be engaged as part of the programme using a phased approach to ensure any necessary change is well planned, communicated and embedded.

8.7 It may be necessary to undertake formal consultation to reflect specific changes to how services are delivered via specific access channels as the programme progresses and the programme will provide regular updates in this regard.

8.8 The Overview and Scrutiny Commission asked to be kept closely involved in the programme.  Following the call-in of the original Cabinet decision on 25 July 2012, further update reports were presented to the Commission on 20 January 2013, 16 July 2013, 11 March 2014, 7 October 2014 and 29 January 2015; and the draft Customer Contact Strategy was presented to the Commission for consultation on 28 February 2013.  The programme is next expected to report to the Commission on progress in March 2015.

## 9. Timetable

9.1 The timetable for contract signature (which is subject to democratic procedures) is as follows:

| Cabinet Decision | 9th March 2015 |
| --- | --- |

| Call-In deadline | 17th March 2015 |
| --- | --- |
| Notification of Preferred Bidder | 17th March 2015 |
| End of 10 day stand still period | 27th March 2015 |
| Contract Signature | 2nd April 2015 |

9.2 The preferred provider has submitted as part of their bid a detailed implementation plan and timetable, but this will need to be ratified as part of contract initiation and is therefore not included in this report.

## 10. Financial, resource and property implications

10.1 In July 2012 Cabinet awarded £1.589m investment costs to pursue channel shift funded from the Outstanding Council Programme, plus the following running costs that were built into the MTFS:

**Annual Running Costs**

| | **£** |
| --- | --- |
| 2012/13 | 39,750 |
| 2013/14 | 159,000 |
| 2014/15 | 205,250 |
| 2015/16 onwards | 344,000 |

10.2 Cabinet should note that these costs were based on the purchase of the technology solution recommended within the report and prior to the decision to undertake a full competitive OJEU procurement process against more detailed requirements.

10.3 In February 2013 Cabinet awarded £1.3m from earmarked reserves for an electronic document management system to replace the existing solution and this has been built into the budget for this project.

10.4 Officers have been cautious in articulating anticipated savings against the Customer Contact programme; this is for two principal reasons.

10.5 Firstly, it has been difficult to state with certainty the nature and extent of savings until the nature of the chosen solution and scope of implementation was clear. Now that a detailed description of the solution is available and the pathfinder services in which it will be implemented defined, officers can begin to baseline the cost of contact in these service areas in order to both estimate and track realistic savings.

10.6     Secondly, and perhaps most importantly, the savings that the programme will enable will be delivered by the service areas that deploy the technology to bring about a shift in customer contact to online channels and thus realise staff efficiencies through a reduction in customer contact.  This presents a real threat of double counting savings, that is to say that a single expected saving is counted within the budget twice: once for the relevant service area and once by the programme, but only realised once.

10.7     The programme is therefore better understood as an enabler that underpins a new way of operating across the authority that will allow individual service areas to realise efficiencies that enable them to achieve savings.  The savings already agreed that will be enabled by the technology and associated services that this contract secures have been identified in Appendix A of this report.  The appendix gives a sense of the extent to which the Council's Medium Term Financial Strategy is dependent upon this technology and the level of savings that would be put at risk should Cabinet decide not to award the contract.

10.8     The anticipated expenditure associated with both the contract award and associated internal implementation can be contained within the available budget.

10.9     The replacement of existing scanners was agreed by Cabinet as part of the EDMS project approved in February 2013.  During the early stages of dialogue, bidders indicated that it would present better value for the council to secure these through a separate procurement exercise.  This report therefore requests approval to undertake an appropriate procurement exercise to secure this equipment; the costs to be met from the agreed programme budget.  Cabinet will want to note that as part of the contract, the preferred bidder has undertaken to integrate and support the scanning hardware to ensure there is alignment and any interdependencies are effectively managed.

10.10    In order to integrate both the customer contact and electronic document management elements of the solution to the council's existing back-office systems, system integrators – or APIs – will be required.  An API **(application programming interface)** is code that allows two software programmes to communicate with each other.  The preferred bidder has included within their Tender the cost of the API for their solution; however APIs will also be needed for the council's existing line-of-business systems.  Through dialogue with bidders it has become apparent that it is most cost effective for the council to purchase these separately with existing suppliers, albeit with the support and advice of the preferred bidder.  It is therefore a recommendation of this report that Cabinet authorise the purchase of APIs as required through appropriate procurement procedures; the costs to be met from the agreed programme budget.

10.11    A number of existing systems will be decommissioned by this project.  The preferred bidder has undertaken to work with officers to maximise these in line with the council's IT Strategy.  Based on an initial review, the systems that will be decommissioned currently attract annual costs in the region of £121.86k.  This will be reviewed and confirmed during project inception.

10.12   There are likely to be further phases of roll out, especially in the case of EDRMS. These will need to be justified on a case by case basis.

10.13   Further information is contained within Confidential Appendix D.


## 11.     Legal and Statutory Implications

11.1    The procurement process has been undertaken in accordance with the council's Contract Standing Orders, the council's Procurement Strategy, the Public Contracts Regulations 2006 and the EU Procurement Directive 2004/18/EC.

11.2    In accordance with Regulation 18(24) of the Public Contracts Regulations the council concluded dialogue on the basis that it had identified one or more solutions capable of meeting its needs. The Call for Final Tender ("CFT") was issued on 26 January 2015 and final tenders received on 10 February 2015. The council proceeded to assess the tenders received and identified the bidder who had submitted the most economically advantageous tender on the basis of the award criteria specified.

11.3    As stated in paragraph 6.30 of this report the council will issue an Alcatel letter to the unsuccessful Bidder to commence the Alcatel standstill period.

11.4    The legal submission was evaluated as very good.

11.5    The council is proceeding in line with Regulation 18(28) to clarify, where necessary, aspects of the preferred bidder's tender and confirm commitments contained in the tender.

11.6    Legal Services have been consulted and provided advice and assistance, where necessary, throughout the tendering process.

11.7    There are no TUPE implications relating to this service.


## 12.     Risk Management and Health and Safety implications

12.1    All risks, assumptions, issues and dependencies are being actively managed as part of the programme.

12.2    There are not expected to be any Health and Safety implications.


## 13.     Human rights, equalities and community cohesion implications

13.1    There are not expected to be any human rights issues from the programme.

13.2    An Equality Analysis has been undertaken for the programme and was presented to the Corporate Equalities Steering Group on 12 February.  The analysis will be continually revisited and updated throughout the programme and especially at suitable decision points.

13.3 Community and other key stakeholder groups will continue to be engaged as part of the programme and any implications will be managed will the relevant officers in the Council.

**Background Papers – the following documents have been relied on in drawing up this report but do not form part of the report**

- The Council's Contract Standing Orders
- The Council's Procurement Strategy
- Merton Customer Contact Strategy
- Customer Contact Strategy report to Cabinet 11 March 2013
- Customer Contact Options Appraisal report to Cabinet 12 July 2012
- Electronic Document Management System report to Cabinet 18 February 2013
- Merton Customer Insight Programme Board presentation 9 January 2014 by Red Quadrant
- Customer Contact Programme Equalities Analysis
- Evaluation criteria

## 14. Contacts

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## 15. Useful links

15.1 Merton Council's Web site: http://www.merton.gov.uk

15.2    Readers should note the terms of the legal information (disclaimer) regarding information on Merton Council's and third party linked websites. http://www.merton.gov.uk/legal.htm

15.3    This disclaimer also applies to any links provided here.

## 16.    Appendices

A.  Agreed Savings Associated with Customer Contact/EDMS.

## 17.    Confidential Appendices – the following documents are to be published with this report and form part of the report.

B. Organisation to whom it is recommended to award the contract

C. Evaluation of Customer Contact bids

D. Financial implications

## Appendix A – Agreed Savings Associated with Customer Contact/EDMS

| Ref | Description of Saving | 2014/15 £'000 | 2015/16 £'000 | 2016/17 £'000 | 2017/18 £'000 |
|---|---|---|---|---|---|
| **2013/17 Budget** | | | | | |
| CH04 | Staffing restructure to deliver efficient processes, and building on planned shift of some customers to manage their own processes | 148 | 0 | 100 | |
| CS17 | Reduction in paper invoices through scanning and deletion of scanning role | | 30 | | |
| CS35 | Closure of cash office and resulting staff savings | 30 | | | |
| CS39 | Implementation of Channel shift strategy and customer services review | 30 | 30 | 30 | |
| EN14 | Mobile technology delivering efficiencies through reduced paperwork | | 100 | | |
| **2014/17 Budget** | | | | | |
| CS63 | Reorganisation of systems development and support arrangements | | | 88 | 74 |
| **2015/18 Budget** | | | | | |
| CSD3 | Rationalise IT support and delivery | | | 86 | |
| CSD5 | Increased external bookings at Chaucer Centre | | | 40 | |
| CSD7 | Restructure Post and Print Section | | | 40 | |
| CSD8 | Restructure IT Service Delivery | | | 40 | |
| CSD13 | Reduce Customer Access Points | | 15 | | |
| CSD14 | Further automation to reduce need for Revenues Officer | | | 30 | |
| CSD36 | Business Systems re-structure following rationalisation of IT systems Phase 1 | | 10 | | |
| CSD39 | Business Systems re-structure following rationalisation of IT systems Phase 2 | | | 50 | |
| CSD41 | Consolidation of Systems Support | | | 20 | |
| CSD43 | Shared service for FoI and Information Governance | | | 40 | 40 |

| Ref | Description of Saving | 2014/15 £'000 | 2015/16 £'000 | 2016/17 £'000 | 2017/18 £'000 |
|---|---|---|---|---|---|
| E&R 3 | Improve on-line Booking functions | | | | 16 |
| E&R10 | Back-office re-organisation | | | 80 | |
| E&r34 | Alternative delivery model of Highways Inspection Team | | | | 30 |

**Merton Council**