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Customer First – Guide to the Entitlement Card Sub Programme 2005-2006

Our Vision:

...Where possible, any customer who comes into contact with Scottish Councils should have their service delivered, their problem resolved, or their question answered at the first point of contact. This means no unnecessary form filling, no asking for information that has already been given, no unnecessary referrals to other members of staff or other organisations...

THE IMPROVEMENT SERVICE

The Improvement Service (IS) is a partnership between the Scottish Executive, the Convention of Scottish Local Authorities (COSLA) and the Society of Local Authority Chief Executives in Scotland (SOLACE). Our purpose is:

"To work with Scottish Councils, their Partners and Stakeholders to improve the efficiency, quality and accountability of local Public Services across Scotland."

CUSTOMER FIRST

Customer First is a Scottish Executive sponsored programme developed in partnership with Scottish local authorities and managed, with the support of SOLACE, under the direction of the IS.

It supports the IS principles of: easier to access, better integrated, local services; effective collaboration across the public sector; better use of public resources; high standards of public service; and willingness to innovate and learn from others.

It underpins the Executive's commitment to provide financial support for, and work in partnership with, all 32 of Scotland's Councils to:

- Deliver more convenient and responsive public services.
- Encourage the take up of online (self-service) access to services.
- Ensure that at least 75% of core service requests can be dealt with at the first point of contact.

As well as meeting the challenge set out in the Partnership Agreement to deliver excellent public services, the programme will also contribute to the targets for delivering efficiency savings across the public sector.

Entitlement Card Sub Programme Priorities to March 2006

| | Completed By |
|---------------------------------------|--------------------------|
| Benefits Realisation Framework | Tue 31/05/05 |
| Recruit project team | Fri 29/04/05 |
| Card procurement | Fri 29/07/05 |
| Establish local authority involvement | Fri 10/06/05 |
| Establish sustainable cost model | Thu 30/06/05 |
| Specify encoding model | Fri 10/06/05 |
| Identify bureau for card production | Fri 07/10/05 (from 15/7) |
| Form Designed and Approved | Fri 29/07/05 |
| Forms Printed | Mon 03/10/05 |
| Issuing and validating forms (START) | Tue 04/10/05 |
| Card designs finalised | Mon 31/10/05 |
| Card delivery to bureau(START) | Mon 31/10/05 |
| Forms sent to bureau (START) | Mon 07/11/05 |
| Helplines established | Mon 21/11/05 |
| Card management implemented | Mon 05/12/05 |
| Card production (begins 14/11/05) | Fri 31/03/06 |
| Card distribution (begins 13/02/06) | Fri 31/03/06 |

Sub Programme Remit – Entitlement Card

To deliver a national, voluntary, entitlement card scheme and a single platform for the wider development of smartcard technology across Scotland. By April 2006 over 1 million elderly citizens and citizens with disabilities will have been issued with a single smartcard that will give them access to the travel concession.

Key Tasks in 2005/06 for Entitlement Card

- Agree the technical solution and the local / national branding requirements for the national implementation.
- Initiate the national entitlement card procurement.
- Establish the managed service requirements / bureau facilities for card production and distribution.
- Begin to populate the citizen account with concessionary fare data.
- Establish card production and card distribution process.
- Design a Card Management System based upon citizen account status.
- Complete the roll out of the entitlement card to concessionary travel holders.
- Populate citizen account with entitlement data.
- Verify entitlement through data matching and cleansing from existing concessionary fare data.
- Implement registration and consent processes to set up the account.
- Issue standardised consent form to enable the account and produce the entitlement card record.

Customer First – Achieving Our Objectives

Customer First can only be successful with the support and leadership from those best placed to influence and manage change. Culture change, to ensure the right balance is struck between local and Scotland wide service delivery; business process design change, to build and deliver services around the needs of the customer; technology change, to make sure that staff have the relevant information and knowledge - at the time that they need it - to ensure first time delivery. Customer First will:

- Be managed under the direction of the Improvement Service Board, to provide both the political and the senior management influence that can promote the programme and the take-up of its products and good practice.
- Establish a Customer First Programme Management Board which can provide strong governance on behalf of the Board and can call upon senior management figures from across the whole public sector to provide advice and guidance.
- Publish a strategic plan for the programme, underpinned by an annual business plan to ensure that the aims, objectives, deliverables and accountability for the programme are clearly communicated.
- Appoint a strong Programme Management Team, to ensure that the business plan is delivered, and is underpinned by clear project plans that show the timescales and the targets for the programme.
- Introduce a benefits realisation programme to demonstrate how the citizen, staff within the local authorities, public sector organisations and the wider efficient government agenda, has benefited from the programme.

Entitlement Card Sub Programme: How will the customer benefit?

- The introduction of a single entitlement card (smartcard), which can replace the many and incompatible schemes that currently exist. The first roll out of the card will support the new Scotland-wide free bus travel scheme for elderly and disabled people.
- Through the application process citizens' consent for data sharing will be recorded. This consent will enable the joining up of local authority back office systems to share data. Citizens will only have to provide change information once and the change will take place across all systems.

Links to the other Customer First Sub-Programmes:

1. National Infrastructure (Data Sharing)

To help ensure that citizens get the services that they are entitled to by establishing a secure and sustainable national data-sharing infrastructure, which includes a citizen account and citizen entitlement status, linked to an address gazetteer. The account will only be enabled with the informed consent of the citizen and secure business processes will ensure that only updates from an authenticated (trusted) source are able to alter the status of an account.

2. CRM/CA Programme

To work with Councils to: develop the local citizen account along with local CRM priorities; develop a single point of contact for the first time delivery of core services; train multi-skilled front-office customer services staff who can deal with a wide range of enquires. We will also work with Councils to develop a common A- Z of services for the promotion and take-up of online (self-service) transactions.

3. Definitive National Address for Scotland Programme

To work with every council to deliver a sustainable corporate address gazetteer that can be integrated into the local authority back office systems, and provide an accurate data source to sustain the national infrastructure.

Customer First - The Business Planning Framework 2005/06

The 2005/06 priorities are set out under the broad objectives below, to:

- *Deliver a sustainable national infrastructure and messaging hub to support a secure Citizen Account and Property Gazetteer, ensuring that business processes maintain the integrity of the infrastructure and authentication processes ensure that only updates from a trusted source are able to alter the status of a record.*
- *Ensure that the Citizen's Account can be enabled to support a number of local and national entitlements under the national entitlement scheme.*
- *Deliver an operational national voluntary entitlement card scheme with the first entitlement - concessionary fares - by 1 April 2006.*
- *Deliver, via the local Council CRM and back office integration process, a single point of contact for the first time delivery of public services, to track transactions via a sustainable citizen account and provide an accurate citizen data source to sustain the national infrastructure.*
- *Deliver a sustainable corporate gazetteer in every Council, integrated -via the CRM- into the local back office systems, and providing an accurate data source to sustain the national infrastructure.*
- *Establish a procurement function that can deliver economies of scale in procuring goods and services for Customer First partners and provide a model for a joint procurement service on behalf of local authorities.*
- *Establish a benefits realisation programme for Customer First to ensure that first timer delivery of core service requests can be monitored and efficiency savings can be measured.*

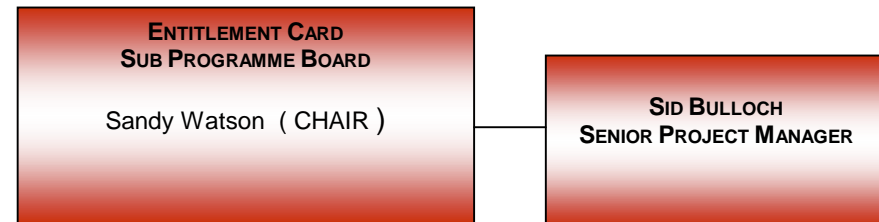
Examples of Entitlement Cards



Customer First – Governance Model

The IS Board has established a Customer First Board to oversee and manage the programme under an Operational Services Director. Four sub-programme boards, each under the chairmanship of a SOLACE appointed Senior Responsible Officer, will ensure that the national infrastructure requirements and developments are properly co-ordinated with local projects. A Programme Office has been established to ensure that the appropriate resources are in place to deliver the programme.

Governance Model



Board Composition

ENTITLEMENT CARD SUB PROGRAMME BOARD MEMBERS

1. Rhona Atkinson, Aberdeen City Council
2. Stuart Forrest, Scottish Executive Transport Division
3. Anne Gibson, Strathclyde Passenger Transport
4. Elma Murray, Glasgow City Council
5. Mark Little, Young Scot
6. Andrew Unsworth, City of Edinburgh Council
7. Jim Lamond, E Lothian Council
8. Jean Douglas, N Lanarkshire Council
9. Paul Carroll, Dundee City Council
10. Jim Kinney, The Improvement Service
11. Sid Bulloch, The Improvement Service

Entitlement Card Sub Programme: Groups, Remits and Working Group Leads

[1]
**CASHLESS CATERING
 USER GROUP**
 LEAD -
**DUMFRIES &
 GALLOWAY**

[1]
 Established by the previous SCASC Working Group the user group is responsible for all elements of smartcard based cashless catering. The group have developed process maps, risks and issues registers and reports on measurable outcomes. Their remit includes the sharing of knowledge widely across all 32 councils.

[2]
**PUPIL REGISTRATION
 WORKING GROUP**
 LEAD -
WEST LOTHIAN

[2]
 The Working Group is responsible for all elements of smartcard based pupil registration. The group have procured software, developed process maps, risks and issues registers and reports on measurable outcomes. A report on the viability of smartcards in pupil registration is expected in early 2006.

[3]
**LIBRARIES PROJECT
 TEAM**
 LEAD - **SLIC**

[3]
 The Libraries Project Team is responsible for delivering, a standardised approach to the issue of smartcards across the Scottish public libraries sector and to work with suppliers to rationalise the different approaches taken by different local authorities.

[4]
**LEISURE PROJECT
 TEAM**
 LEAD - **TBD**

[4]
 The Leisure Project Team is responsible for developing a single specification for a smartcard interface with leisure management systems irrespective of supplier. This will contain overall development costs and ensure that there is consistent use of the cards.

[5]
**CUSTOMER FIRST
 TECHNICAL SUB-GROUP –
 A CROSS PROGRAMME
 GROUP –**
 LEAD UNDER REVIEW

[6]
 The Group's principal purpose is to provide technical expertise and advice on how the Citizen's Account - provided as part of the National Infrastructure - will be integrated with the deliverables of the CRM, DNA-S and Entitlement Card Programmes.