



The Improvement Service

Customer First - Business Plan 2005/06

Customer First Business Plan 2005/06

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Customer First – The Bigger Picture

1. 'Customer First' is a three year programme which is part of the Scottish Executive and Scottish Councils' drive towards delivering excellent public services. It supports all of Scotland's local Councils in their aim to improve the services that they deliver to their customers. With the support of key partners such as the Executive, COSLA and SOLACE, it will provide a framework within which all Councils will be able to work together on an agreed set of outcomes built around local priorities, while at the same time sharing development costs across common areas and helping to spread practice. The Improvement Service will manage the Programme under the direction of a Management Board, and as part of its wider remit it will act as an agent to support change management and best practice.
2. The programme supports the common and consistent use of a number of key business change / business transformation methods across Councils and it encourages a common approach to a number of key service delivery and data sharing technologies. Most importantly the programme contributes towards a set of measurable service improvements that customers will recognise and contributes to the drive for efficiency and cost savings that can be reinvested in the further improvement of frontline services.
3. The programme recognises that business change is a long-term and large-scale challenge for Councils. Therefore, it concentrates upon a number of key themes that can be supported within the context of a managed programme, that:
 - Provides continuity under the Modernising Government Fund (MGF) strategy to deliver joined up services in a way that is seamless to the customer.
 - Supports culture change to encourage a more corporate approach to service delivery.
 - Provides a consistent approach to managing customer contact via a number of channels, ensuring that services are delivered 'first time' wherever possible.
 - Improves the efficiency – the speed – at which customer queries are resolved, and the effectiveness – the outcome – which the customer receives.

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- By having more robust record management, ensures that customers - as far as possible - are not asked to provide the same information more than once.
 - Provides front line Customer Services staff with the technology, the training and the tools to be able to access information about services and the relevant information about customers, thereby enabling them to identify and to meet the needs of customers who are sitting in front of them or who are at the other end of the telephone.
 - Supports the need to improve knowledge management to enable Councils to learn from and improve service delivery (and share best practice); and the need to provide better management information for the setting of objectives and standards, and the measurement of performance.
4. Working together within the Programme, Councils will move towards the convergence of key technologies and standards that can be applied across the public sector and continue the roll out and further develop local service delivery channels. In particular:
- A secure national and local infrastructure built upon core data sets such as corporate address gazetteers and electronic customer records (based upon a citizen account and informed consent) that can support secure data and information sharing across the public sector.
 - Business process re-engineering and back office integration.
 - Customer Relationship Management (CRM).
 - Contact centres.
 - Secure and authenticated access – where necessary – to online service delivery.
 - Smartcards (and the National Citizen Entitlement Card).
5. The programme will deliver cost savings that can be re-invested in the delivery of improved frontline service priorities by:
- Developing simplified and common 'end-to-end' business processes.

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- Implementing outcome focused service delivery.
- Ensuring better and more cost effective management of data and information.
- Reducing the cost of dealing with customer queries by reducing the processing time.
- Sharing back office services across Councils and with other service providers.
- Enabling customer self-service.

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Outline of Customer First 2005 - 2008

6. 'Customer First' is sponsored by the Scottish Executive to support the policy objective of delivering excellent public services (as set out in the Partnership For A Better Scotland, the 'Partnership Agreement'). A funding package of £34.55m from the third round of the MGF has been put in place; the real value of the programme is significantly more, with local authorities providing funding through their own modernisation (business change) and efficiency programmes. The overall aims of the programme are set out in a strategic document called 'Customer First 2005 - 2008'.

7. The programme has two clear - but inter-dependent – objectives. Firstly, to build a secure national infrastructure that can: support the principle of secure data sharing across the public sector; provide authenticated access to online services (via a citizen's account and a citizen's entitlement card); help automate the award of services, benefits and entitlements to citizens. Secondly, to ensure that local authorities are able to enhance the citizen's account: to deliver more efficient and more effective core services; to automatically award local benefits and entitlements (including the use of the National Entitlement Card Scheme); to encourage the growth and take up in self-service transactions.

8. The primary objective of Customer First is to deliver public services at first contact, with citizens having a choice on how they transact with local authority services, via the telephone, face-to-face, online or (where appropriate) at home. Every citizen who contacts their, or another, local authority will have their call answered within a reasonable time, with the ultimate target of 100% removal of 'abandoned' service calls.

9. The programme will also deliver economies of scale by providing a framework for joint investment, shared services, managed services and sharing best practice.

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Customer First – Funding and Governance

10. A total of £12.5m in local payments has already been made to Councils in March 2005, with future provision and payments to be determined by the Scottish Executive. The monitoring and reconciliation of this expenditure is the responsibility of the Executive, but the Customer First Programme Office will provide support.

11. A further funding provision is available to the IS for the central management and delivery of the national elements of the programme. This comprises £6m capital and £2m revenue support. The IS Board has established a Customer First Programme Management Board to oversee and manage the programme under an Operational Services Director. Four sub-programme boards, each under the chairmanship of a Management Board appointed Senior Responsible Officer, will ensure that the national infrastructure requirements and developments are properly co-ordinated with local projects. The sub- programme Boards are:

- National Citizen Account Data Sharing Infrastructure
- Local Citizen Account / Customer Relationship Management
- Definitive National Addressing
- National Entitlement Card Scheme

12. A Programme Office has been established to ensure that the appropriate resources are in place to deliver the programme. The governance arrangements are highlighted in **(Annex A)**.

Business Planning Objectives 2005/06

13. These are the broad targets for the first year:

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- On the national Infrastructure we will: - complete the first phase of the national infrastructure (proof of concept) by agreeing the technical architecture and implementing a test (Interim) solution; develop and test the business processes (birth, death, change of address) that will maintain the integrity of the infrastructure around an index of Unique Citizen Reference Numbers (UCRN); design and test a messaging mechanism to support the secure exchange of data across the public sector; complete a site review to enable the move from a test environment to a live environment; tender and procure a solution for the live environment; agree the cost model for sustaining the infrastructure; agree on a national authentication model.
- On the Citizen Account we will: - agree the data schema for the national account and build it into the first phase of the national infrastructure; create an interim account and populate it with the best available local and national data (e.g. to include the account number, name, DoB and address); agree the registration process and the data sharing protocols – informed consent - that are required to activate the account; activate the interim account (through a single, nationally agreed, process) to ensure that the entitlement to the new concessionary fare can be awarded; test authenticated access to the account through the government gateway.
- On the Entitlement Card, we will: - develop and test the model for a Scotland wide entitlement card scheme, (i.e. we will design the business process that enables a citizen account to be activated and an entitlement card to be issued), implement an interim solution that allows an entitlement card to be issued for the concessionary fare; use the best possible data for the interim account to ensure that existing concessionary fares holders are not disadvantaged; agree and procure a card solution that meets the current business requirements of the Scottish Executive and local authorities; agree a joint Scottish Executive / local authority branding for the card; carry out a national procurement exercise for the card; procure bureau services to enable the printing and distribution of the card; work with local authorities to identify those who are best placed to provide a card management service for the whole sector.
- On the Definitive National Addressing we will: - continue to work with all local authorities to complete their local address gazetteers; define a best practice model for the ongoing maintenance and integration of the gazetteer; develop a national address gazetteer within the national infrastructure; populate the national gazetteer with the best available data; use the 'definitive' address gazetteers from the local authorities to properly match and cleanse the national data; design the business

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processes that can maintain the integrity of the data; determine how to populate the citizen account with the Unique Property Reference Number in order to provide a definitive citizen (customer) address.

- On the local Citizen Account / Customer Relationship Management, we will: - agree the minimum requirements for a standardised local citizen account schema; continue to work with local authorities to support a customer focused / multi channel model for the delivery of services; promote the business re-engineering and business process mapping that supports first-time delivery of services; support the spread of best practice e.g. publish and market business process maps across councils; develop a common A – Z of public services that can underpin a consistent approach to online services and provide the basis for an agreement on the correct level of authentication for these services; establish a Scotland wide accredited programme for the training of multi-skilled Customer Services staff.
- On Benefits Realisation, we will: – continue to work with councils to develop and refine benefits realisation / efficiency savings across the 46 core services; define and agree common definitions for first time delivery; establish a monitoring tool to measure transaction volumes / times across the different service delivery channels; measure improvements in transaction processing and quantify in terms of time releasing / cash releasing savings; develop and agree a consistent model for the measurement of customer satisfaction.

14. The timetable and target dates for the 2005/06 priorities is set out in **Annex B**, under the following broad objectives to:

- Deliver a 'proof of concept' version of the **national infrastructure** and messaging hub that can support a **secure Citizen Account and Property Gazetteer**, ensuring that business processes can maintain the integrity of the infrastructure and authentication processes ensure that only updates from a trusted source are able to alter the status of an account.*
- Establish a working version of the Citizen's Account and demonstrate that it can be enabled to support a number of **local and national entitlements** under the national entitlement card scheme.*
- Deliver an early operational version of the national **voluntary entitlement card scheme** to accommodate the concessionary fare by 1 April 2006.*

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- d. *Deliver, via the local Council CRM and back office integration process, a model for the development of **single point of contact for the first time delivery of public services**, (to be able to track transactions via a sustainable citizen account and provide an accurate data source to help sustain the national infrastructure).*
 - e. *To deliver a **sustainable corporate gazetteer in every local authority**, integrated - via CRM - into the local back office systems, and help to develop the business solution for a sustainable address gazetteer within the national infrastructure.*
 - f. *To establish a **procurement function** that can deliver economies of scale in procuring goods and services for the Customer First programme and its partners.*
 - g. *Establish a **benefits realisation programme** for Customer First to ensure that first time delivery of core service requests can be monitored and efficiency savings can be measured.*
15. The Business Plan will be underpinned by a comprehensive project plan, developed jointly by the Programme Managers, that sets out the key deliverables, milestones, dependencies and risks. A summarised Risk Register is attached at **Annex C**.
16. The programme was developed in partnership with Scottish Councils and consolidates the work started under the first and second rounds of the MGF. The deliverables and targets established in the programme will build upon the service improvements already delivered by the early rounds of the MGF and the projected benefits set out by Councils in their further applications to the MGF.

Customer First and the Improvement Service

17. The programme will be managed under the direction of the Improvement Service with the support of the Scottish Executive, SOLACE and COSLA. 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.

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18. The programme sits within two of the core objectives of the Improvement Service to support the:

- Public expectation that services should be easy to access and designed and delivered in an integrated way.
- Need to ensure that efficient government works and joint working / partnership working happens efficiently and effectively.
- The programme supports the vision for Scottish Councils to be:
 - Effective partners with the Scottish Executive in service development.
 - Effective partners to other organisations in developing the range, the quality and the effectiveness of local public services.
 - Responsive and accountable to local service users.
 - Committed to ensuring that resources are used efficiently.
 - Willing to learn from others and share knowledge and best practice.
 - Committed to ensuring that staff are supported and resourced to meet the new demands that change and innovation will bring.

19. Customer First will also contribute to the Improvement Service programmes for:

- National infrastructure and local development.
- Performance Management.
- Supporting partnerships and joint working.
- Supporting improvement and innovation.

20. The Executive has already made a significant commitment both to the establishment and the funding of the Improvement Service and this further support underpins the Executive's provision in the 2004 Spending Review to provide financial support for, and work in partnership with, all 32 local authorities to:

- Deliver more convenient and responsive public services.

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

21. Through the National Entitlement Card Scheme it also underpins a key Scottish Executive commitment from the Partnership Agreement to extend the concessionary fares scheme on public transport, including a national free off-peak bus scheme for older people and people with disabilities.

Longer Term Objectives

22. 'Customer First' will be managed by the 'service delivery arm' of the Improvement Service under the Director of Operational Services.

23. The key deliverables from the programme are:

- An overall target to ensure that customers receive 'first time' delivery of core services (initial target 75%).
- A customer satisfaction model is put in place, with a targeted satisfaction rating (initial target 90%).
- A business change model – including culture change – that will reduce back-office overheads and promote front line delivery (including self-service).
- The development and training of front line Customer Services staff to deliver first time services (including a nationally accredited qualification).
- The development of a common A – Z of services, and a knowledge management system to underpin this.
- Customers whose calls need to be referred will not have to repeat their details and the background to their service requests (which can increase the transaction time, and cost, by as much as 50%).
- The development of a single electronic record – a citizen's account – and the ability to monitor transactions within that account to ensure that staff can have immediate access to service information and the customer's details.

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- Improved business process to reduce the transaction time – and cost – of delivering the core services, and promote the most efficient and effective way to deliver services
- Core services – 46 of them – targeted for improvement.
- Core transactions – around 12 million of them – targeted for improvement.
- The introduction of a Scotland wide standardised single, electronic, customer record (citizen's account).
- Along with their citizen's account, customers will have a public services network that can ensure that changes to their basic circumstances – address change, name change, notification of death – will be accurately and securely handled, e.g. neither grief nor embarrassment will be caused by sending correspondence to the wrong person or the wrong address, or to someone who is deceased.
- The introduction of a National Entitlement Card Scheme (smartcard) – the major applications and client groups being transport (national concessionary fares scheme) and services to young people.
- The introduction of a single, electronic, property record, including a national property address gazetteer
- Measurable service improvements coupled with measurable efficiency savings (long-term recurring target of £56m pa)
- The common exploitation of CRM technology including consistent service improvement / management information and reporting to Elected Members, Senior Managers and the Executive.

24. All of the above will be overlaid with a 'National Infrastructure' for secure data sharing (initially between the General Register Office for Scotland (GROS), Councils, the NHS and key community planning partners). This infrastructure will enable the exchange of key changes to the status of an individual (to ensure their well-being) as well as providing a national framework for the promotion, take up and authentication for online services.

Benefits Realisation

25. Local authorities deliver a wide range of services and each authority will set its own priorities for improvement and efficiency. However, there has been a specific consultation process with Councils on some of the services that should be prioritised for

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improvement and an agreement has been reached on 46 of the core services that can be targeted. These services are set out in **Annex D** and have been chosen because: they reflect customers' most frequent needs; they can be re-engineered as end-to-end processes (from service request through to payment); they provide a best fit for electronic service delivery; they can be delivered consistently through different channels; they can be delivered from a single point of contact by well trained Customer Services Staff; they can be promoted as online services with an appropriate level of authentication defined.

26. It is not the role of the Management Board nor the Customer First Programme Office to prescribe which services each Council should prioritise. However, there is an expectation that Councils will deliver efficiencies across a range of the services identified, and that Councils will be able to record and report on the benefits and efficiencies gained. The Customer First programme will support this activity by helping to communicate and report these benefits, across Councils and across the wider public sector, as part of its role in spreading good practice.

27. Benefits realisation will be built around high-level reporting to support the broad policy objective of delivering excellent public services (including case studies for spreading best practice) and around a set of measurable improvements at a more detailed (and prescribed) level. At the more detailed level, specific benefits and efficiencies will be targeted and monitored through a consistent and common approach. This approach will be as simple and practical as possible, with the minimum administrative burden on Councils. We will do this by ensuring that the benefits realisation (management) information is a natural by-product of the service improvement process and not a 'bolt on' exercise.

28. For each of the core services, activity will be measured against the following:

- Transaction volumes across the different service delivery channels – telephone, face-to-face and online.
- Service requests dealt with at the first point of contact.
- The measured growth in online (self-service) transactions.
- Efficiency savings and improvements in terms of 'time releasing savings' (savings which do not release cash but allow frontline services to deliver more or better services with the same money).

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- Efficiency savings and improvements in terms of ‘cash releasing savings’ (savings where an efficiency measure generates an actual resource saving because the Council delivers the same service with less money).
- The number of newly trained and accredited front line Customer Services staff.
- The level of customer satisfaction.

29. An update Benefits Realisation report will be produced on a quarterly basis for submission to the sub Programme Boards and the Management Board. A composite (Executive) report will also be available for the IS Board and the Scottish Executive. A detailed analysis of outcomes, benefits and savings will be produced annually (although ad hoc reporting will be available through a new online benefits realisation reporting system).

Governance

30. The Improvement Service Board will oversee the delivery of Customer First under a Management Board which will be responsible for the delivery of the programme, budgetary responsibility for centrally managed funds and management responsibilities for Customer First.

31. The Improvement Service under the Director of Operational Services will establish a dedicated team of Programme Managers (filled by full-time secondments from local authorities). The Customer First Programme Office will, in the short term, be based in Stirling (until such time as relocation to Improvement Service premises is determined). The Director will have line management responsibilities for the entire programme management resources, responsibility for the monitoring of the 75% target for ‘first time’ delivery, the efficiency savings and the growth in online services. The Director will be accountable for reporting the progress of this to the Improvement Service Board and to the Scottish Executive.

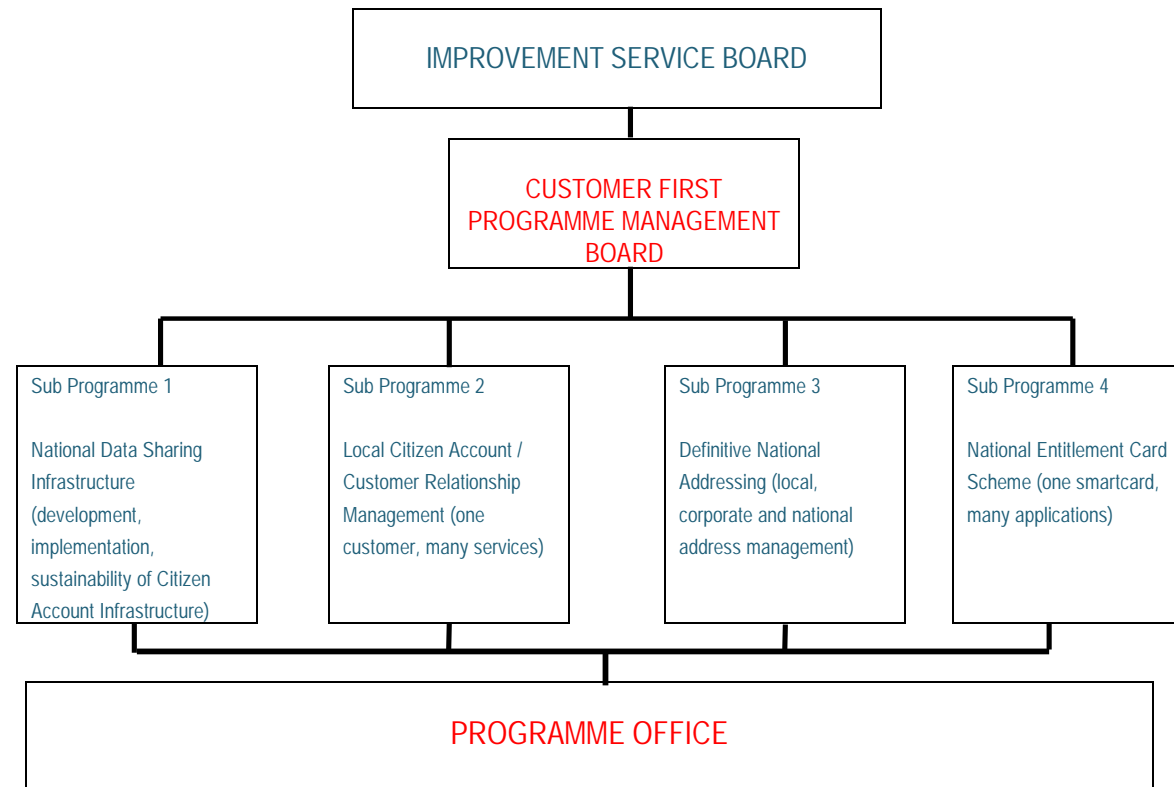
32. The local authorities will establish local governance and project management roles under the direction of a nominated MGF / Customer First Co-ordinator. Using MGF support and their local funding, Councils will be responsible for determining their own strategic and service priorities in relation to Customer First; but will provide a Customer First strategy and financial reports to the Executive and detailed outcome reports to the Customer First Programme Team.

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33. The Scottish Executive will retain the policy role in determining the drivers, priorities and allocation of any future MGF support (with input and advice from the Improvement Service Board), the central reconciliation of outcomes achieved against policy objectives for reporting to Ministers and overall financial reconciliation of expenditure on the Customer First programme.
34. The Improvement Service will also act as a first point of contact for suppliers and as a potential procurement body for the local authorities in relation to Customer First contracts for goods and services.
35. Customer First is managed using the Office of Government Commerce “Managing Successful Programmes MSP” methodology which underpins the analysis of measurable outcomes and development of benefits realisation profiles and strategy.

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Annex A - Governance



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Annex B – Business Objectives 2005/06

<p>(1) Objective A</p>	<p><i>Deliver a ‘proof of concept’ version of the national infrastructure and messaging hub that can support a secure Citizen Account and Property Gazetteer. Ensuring that business processes can maintain the integrity of the infrastructure and authentication processes ensure that only updates from a trusted source are able to alter the status of an Account</i></p>
<p>(2) Owner</p>	<p>Improvement Service, Operational Services Directorate: Programme Manager (National Infrastructure - Technical Architecture) – Cameron Walker</p>

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<p>(3) More detailed description of Objective</p>	<p>The national infrastructure will provide a platform – shared equally by all 32 local authorities – to provide the ‘glue’ to join the discrete Customer First programmes into a strategic technical platform upon which to build a number of managed service / shared service capabilities for the wider public sector. The programme will specifically develop technical and physical architecture, national repositories to store key public sector data (the core Citizen’s Account and an Address Gazetteer) and the business processes to maintain and support a change in status that affects these repositories. This years plan includes a test messaging infrastructure that can be used to maintain / manage/ inform the Citizen Account (CA) status.</p> <p>Central to this process will be a link between an index that contains a Unique Citizen Reference Number (UCRN) and an index that contains a Unique Property Reference Number (UPRN). It will NOT provide a large central repository for storing transactions, but it will provide a central indexing tool, i.e. anonymous data, which will provide a pointer to data that can be used as part of the verification process to determine eligibility to public services, i.e. for those bodies who have approved access to the index it will point to ‘live’ CA or to a ‘live’ property address. The transactional data for the customer will continue to be retained and maintained by the organisation (principally the local council) that has the responsibility for delivering the service.</p> <p>The ultimate objective of the programme (over three years) is to have a national and local infrastructure and messaging system that supports the management of the customer status. For example if a customer dies then their account will be de-activated and other public service providers notified (messed) in order that neither grief nor embarrassment is caused by trying to contact that customer. Similar process will deal with change of name or address, or birth - where there is a requirement to activate a new CA.</p>
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<p>(4) X-Ref / Relevance to overall programme</p>	<p>Establishing a core record for the citizen’s account and a messaging mechanism to help manage the local citizen’s account and a local customer relationship management infrastructure.</p> <p>Securely - and with informed customer consent - sharing data and information across organisational boundaries</p> <p>Improving the public sectors capacity to share critical data and information</p> <p>A core citizen’s account to underpin the citizen’s entitlement card scheme</p> <p>Interim infrastructure to support free concessionary transport for all elderly and people with disabilities</p> <p>Assembling the data from the local Corporate Address gazetteers into a national address gazetteer</p> <p>Providing an authentication framework for online access to services</p>												
<p>(5) 2005/06 Timeline</p>	Apr 05	May 05	June 05	July 05	Aug 05	Sept 05	Oct 05	Nov 05	Dec 05	Jan 06	Feb 06	Mar 06	Apr 06
<p>(6a) X to mark milestones</p>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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<p>(6b) Milestones and Main activity / output at that date</p>	<p>Apr 2005 Complete requirements capture, produce Project Plan, start Citizen’s Account (CA) pilot</p> <p>May 2005 Produce the first draft of the prototype CA and registration & authentication model</p> <p>Jun 2005 Establish necessary legal framework for national infrastructure Complete technical specification to produce first iteration of the central index, the CA and the address gazetteer Begin design of requirements for data matching, cleansing and augmentation processes Start central address gazetteer and central index development.</p> <p>July 2005 Test business processes for CA status management (birth, death, change of address) Establish ‘Interim’ CA technology to deal with concessionary fares application Initiate site evaluation and procurement exercise for establishing ‘live’ national infrastructure</p> <p>Sep 2005 Test concessionary fares entitlement take-on to the interim CA database</p> <p>Oct 2005 Test CA status for concessionary fares entitlement Populate ‘Interim’ CA infrastructure</p> <p>Nov 2005 Identify necessary site arrangements for live implementation of the national infrastructure Transfer Interim CA and address data to national infrastructure data sets for live testing Population of national infrastructure set with UCRN and UPRN for live testing</p> <p>Dec 2005 – Test upload of concessionary fares entitlement CA records to Card Management System</p> <p>Jan 2006 Test live business processes for maintaining national index and datasets Test authentication processes for citizen maintenance of CA</p>
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(1) Objective B	<i>Establish a working version of the Citizen’s Account and demonstrate that it can be enabled to support a number of local and national entitlements under the national entitlement card scheme.</i>
(2) Owner	Improvement Service, Operational Services Directorate: Programme Manager National Infrastructure (Citizen Account) - Paul Nichol
(3) More detailed description of Objective	<p>The Citizen’s Account (CA) will provide single electronic record for every citizen who is entitled to devolved public services in Scotland. The core CA will be ‘owned’ by the citizen and will only be activated with informed consent from the citizen (or someone who is legitimately authorised to act on the citizen’s behalf). In the longer term citizens will be offered a voluntary Entitlement Card to go along with their CA. The entitlement card is issued on the back of a Citizens Account (CA). The first priority is to offer a CA to support the concessionary fare to older or disabled citizens.</p> <p>The CA will be used to help manage the award of, or the removal of, entitlements that are available on a Scotland wide level. Local authorities will also use the local CA to determine any other awards, entitlements or services that may be available from the local authority, such as concessionary access to leisure centres, library membership, housing or council tax payment. The National CA will hold Entitlement and Consent for national applications, the first being concessionary travel. The Local CA will hold Entitlement and Consent for Local Applications, including libraries, leisure and education.</p> <p>The national Infrastructure will be used to manage the status of the CA, e.g. a secure messaging system will enable the cancellation of the CA and the Entitlement Card if the person dies.</p>

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<p>(4) X-Ref / Relevance to the overall programme</p>	<p>Establishing a core record for the CA and a set of processes to help manage the local CA and a local customer relationship management (CRM) infrastructure.</p> <p>A core CA to underpin the voluntary citizen's entitlement card scheme</p> <p>Implementation of the national Entitlement Card Scheme</p> <p>Free concessionary transport for all elderly and people with disabilities</p> <p>Implementing a Scotland wide card management scheme</p> <p>Providing an authentication framework for online access to services</p> <p>Securely - and with informed customer consent - sharing data and information across organisational boundaries</p> <p>Improving the public sectors capacity to share critical data and information</p>												
<p>(5) 2005/06 Timeline</p>	Apr 05	May 05	June 05	July 05	Aug 05	Sept 05	Oct 05	Nov 05	Dec 05	Jan 06	Feb 06	Mar 06	Apr 06
<p>(6a) X to mark milestones</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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<p>(6b) Milestones and Main activity output at that date</p>	<p>Jul 05 Establish legal position on consent and data sharing Develop data requirements for CA core schema Establish availability of council transport scheme files for data matching Design documentation to send out to eligible citizens Determine electronic records process (where not available from council transport schemes) Modify Core schema to include eligibility and consent Determine business requirements for an Interim version of CA dataset Determine if current Concessionary Fare data can meet upload requirements for Interim CA dataset Start development of ongoing business processes to maintain the integrity of the Interim dataset</p> <p>Aug 05 Determine data matching processes to match eligibility data with GRO data set for verification Identify business processes to enable CA to identify all age related entitlement from DOB</p> <p>Oct 05 If possible pre-populate CA forms to mail out to eligible citizens OR initiate process to despatch blank forms to be completed and returned to local authority (or agent such as Post Office) Start validation of forms for CA purposes Establish business process to update Interim CA and to flag consent and registration level</p> <p>Nov 05 Begin process of CA forms sent to bureau for entitlement card printing and distribution Determine data processing requirements to transfer bureau record to CA Determine data processing requirements to establish CA in the live National Infrastructure</p> <p>Mar 06 End of data transfer process to Interim CA</p>
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(1) Objective C	<i>Deliver an early operational version of the national voluntary entitlement card scheme to accommodate the concessionary fare by 1 April 2006</i>
(2) Owner	Improvement Service, Operational Services Directorate: Senior Project Manager / Entitlement Card - Sid Bulloch
(4) More detailed description of Objective	<p>The delivery of an operational, national voluntary Entitlement Card Scheme (the Scheme) will enhance the provision of services to key client groups – younger people (with applications relating to schools, leisure, libraries and transport) and, as an immediate priority, to the elderly and disabled by underpinning the key Scottish Executive commitment to extend the concessionary fares scheme on public transport.</p> <p>By April 2006 over 1million elderly and disabled citizens will have their Citizen Account (CA) activated and have been issued with a single smartcard that will give them access to the travel concession scheme, and where possible be enabled to carry a number of other local and national applications and entitlements. The programme will involve a unified, national approach in a partnership between the Scottish Executive, Councils and other organisations to establish a single platform for the wider development of public sector smartcard technology across Scotland.</p> <p>All local authorities are now committed to working with the Executive to develop the Scheme. This will be done within a single technical and operational framework for Scotland that provides for national applications to be rolled out alongside local priorities. The Scheme will be co-branded, containing Executive’s branding alongside the local authority logo. Additional branding for particular client groups will be added at the production phase</p> <p>The programme incorporate a nationally agreed solution for the shared / managed service requirements for the Scheme and the card management infrastructure to underpin the Scheme.</p>

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(3) Relevance to the overall programme	A core CA to underpin the voluntary citizen’s Entitlement Card Scheme												
	Implementation of the National Entitlement Card Scheme												
	Implementation of a Scotland wide shared / managed service for card production and distribution												
	Implementation of a set of national standards to provide a common platform for the use of smartcards across the Scottish public sector												
	Free concessionary transport for all elderly and people with disabilities												
	Supporting the integration of all local authority entitlement card schemes into a National Scheme												
	Implementing a Scotland wide card management scheme for card replacement / cancellation												
	Supporting an authentication framework for online access to services												
(5) 2005/06 Timeline	Apr 05	May 05	June 05	July 05	Aug 05	Sept 05	Oct 05	Nov 05	Dec 05	Jan 06	Feb 06	Mar 06	Apr 06
(6a) X to mark milestones	☒	☒	☒	☒	☒	☒	☒	☒	☐	☐	☐	☒	☐

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<p>(6b) Milestones and Main activity / output at that date</p>	<p>May 2005 Confirm Council participation and organise series of local authority workshops for the the National Entitlement Card Scheme (the Scheme) Agree technical specifications for the Scheme and initiate card procurement for Councils and SE Trans Div Establish Technical Support Service for the Scheme Liase with Councils and SE Trans Division on card design Liase with Councils and SE Transport Division on application process for the concessionary fare</p> <p>June 2005 Complete Council consultation process on the priorities for concessionary fares and other applications Agree draft submission on card design for the Scheme Agree application process with SE Transport Div Identify potential bureau facilities for card production</p> <p>July 2005 Confirm with SE Trans Div the application process for the concessionary fare (to identify who qualifies) Agree with Councils the bureau / shared service arrangements for the scheme Initiate bureau tender process for card production and card management Complete card procurement evaluation and award contract</p> <p>Aug 2005 Confirm application and verification process for card application Initiate card application process Arrange batching process for delivering completed form to bureau / shared service Confirm data processing arrangements for conversion of application form to electronic record</p> <p>Sep 2005 Confirm encoding requirements for the card with SE Trans Div Verify further requirements for data cleansing and entitlement status</p> <p>Oct 2005 Test card with Bus Companies</p> <p>Nov 2005 Initiate card production</p> <p>March 2006 Complete card distribution process,</p>
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<p>(1) Objective D</p>	<p><i>Deliver, via the local Council CRM and back office integration process, a model for the development of single point of contact for the first time delivery of public services (to be able to track transactions via a sustainable citizen account and provide an accurate data source to help sustain the national infrastructure)..</i></p>
<p>(2) Owner</p>	<p>Improvement Service, Operational Services Directorate: Programme Manager / CA/CRM – Martin Brown</p>
<p>(3) More detailed description of Objective</p>	<p>This programme supports the bigger picture for the redesign of council services around the needs of the customer and to work in partnership with local authorities to develop a consistent – and where possible a common - approach to the delivery of multi channel ‘first time’ services. This will incorporate the use of the Citizen Account (CA), matching the core schema of the national CA to an extended data set at the local level, which provides the facilities to process and retain data about customer transactions and customer outcomes. The schema for the local CA will be based around the BS8766 standard and the transactional management (back office integration) of the CA will be maintained through a local Customer Relationship Management (CRM) programme.</p> <p>The overall objectives and target is to ensure a single point of access for the core – most frequently requested - services and the delivery of those services by multi skilled Customer Service staff. Councils will also work in partnership to develop a nationally accredited qualification for Customer services staff.</p> <p>As part of the national Infrastructure development, the Council CRM will have an infrastructure link to the national messaging system to enable the exchange of data that is necessary to maintain the integrity of the CA status (birth death, change of name, change of address), i.e. messaging ‘down the way’ to confirm notification of death. Messaging ‘up the way, to notify change of address. Councils will work together to create and agree a common A – Z of services, both to support the delivery and knowledge base of Council services but also to promote the common online presentation of services and the common authentication requirements to access those services online.</p> <p>As well as working together Councils will – with the support of the Programme Manager and the Improvement Service – help to spread knowledge, good practice, customer benefits and staff benefits from the programme.</p>

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(3) Relevance to overall programme	Deliver more convenient and responsive public services												
	Multi channel access to public services												
	First time delivery of public services												
	Growing the demand for online (self service) transactions												
	Efficiency savings in the delivery of public services												
	Well trained and accredited Customer Services Staff												
	A local CA to underpin the voluntary citizen’s Entitlement Card Scheme												
	Supporting a common A - Z and authentication framework for online access to services												
	Ensure that at least 75% of core service requests can be dealt with at first point of contact												
	Measurable improvements coupled with efficiency savings for 46 core services												
Improved customer satisfaction													
(5) 2005/06 Timeline	Apr 05	May 05	June 05	July 05	Aug 05	Sept 05	Oct 05	Nov 05	Dec 05	Jan 06	Feb 06	Mar 06	Apr 06
(6a) X to mark milestones	☒	☒	☒	☒	☒	☒	☒	☐	☒	☒	☒	☒	☒

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<p>6b) Milestones and Main activity / output at that date</p>	<p>April 2005 Launch Change Management Training Packages to support individuals undergoing a process of change</p> <p>May 2005 Undertake an audit of all 32 Councils to determine progress against the key CRM enablers and to assess state of readiness to accept the Citizen Account (CA) and to provide a single point of contact for first time delivery Jointly establish Benefits Realisation Framework for reporting on benefits for CRM/CA Programme</p> <p>June 2005 Develop CRM Roadmap to support Councils in readiness to track transactions via a sustainable CA and providing an accurate citizen data source to sustain the national infrastructure Host Reference Group event for all 32 Councils to help promote the sharing of good practice in the drafting, selection and implementation of the key CRM enablers necessary to provide a single point of contact for the first time delivery of services. Engage key input from among the early adopters and the supplier community Establish penetration of and user satisfaction levels with Change Management Training Packages</p> <p>July 2005 Develop a common approach to the roll out of the local CA and Customer Relationship Management process Share project brief and roadmap for the Knowledge Base of FAQ's and Forms Project with Improvement Service Policy Arm to establish commonalities and to inform future direction of travel</p> <p>August 2005 Pilot the common A to Z of Local Government and other Public Services</p> <p>September 2005 Pilot the nationally-accredited training programme for Customer Services staff Review 1st cut of the pilot common A to Z of Local Government and other Public Services and undertake stakeholder consultation; implement revisions based on feedback</p> <p>October 2005 - Review 1st cut of the pilot for the nationally-accredited training programme for Customer Services staff and undertake stakeholder consultation; implement revisions based on feedback</p> <p>December 2005 Review 2nd Cut of the common A-Z Pilot the Knowledge base and FAQs Undertake an audit of all 32 Councils to determine progress against the key CRM enablers and to assess state of readiness to accept the Citizen Account and to provide a single point of contact for the first time delivery of services</p> <p>January 2006</p> <ul style="list-style-type: none"> • - review 1st cut of the pilot for the Knowledge Base of FAQ's and Forms Project and undertake stakeholder consultation; implement revisions based on feedback • February 2006 – roll out common A to Z of Local Government and other Public Services
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	<p>January 2006 Review the 1st cut of the Knowledge Base of FAQ's and Forms Project</p> <p>February 2006 Review 2nd cut of the pilot for the nationally-accredited training programme for Customer Services staff and undertake stakeholder consultation; implement revisions based on feedback</p> <p>March 2006 Roll out the common A-Z Roll out the nationally-accredited training programme for Customer Services staff</p> <p>April 2006 Review 2nd cut of the pilot for the Knowledge Base of FAQ's and Forms Project and undertake stakeholder consultation; implement revisions based on feedback</p>
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Customer First – Business Plan

<p>(1) Objective E</p>	<p><i>To deliver a sustainable corporate gazetteer in every local authority, integrated - via CRM - into the local back office systems, and help to develop the business solution for a sustainable address gazetteer within the national infrastructure.</i></p>
<p>(2) Owner</p>	<p>Improvement Service, Operational Services Directorate: Programme Manager / DNA-Scotland – Iain McKay</p>
<p>(3) More detailed description of Objective</p>	<p>80% of Councils information is address-based. Customer and address based data is volatile (it frequently changes), which is why it is necessary to have a Corporate Address Gazetteer (CAG) within each council to ensure the consistent use of customers and their addresses to support effective service delivery. Every local authority in Scotland will have a single BS7666 compliant CAG which will provide the definitive source of customer / property addressing for the Council. All Councils will have a strategy for back office integration of this CAG to improve the quality of its address management and to reduce the overhead of address maintenance.</p> <p>The CAG will – through the Customer Relationship Management (CRM) process – link the CAG and a Unique Property Reference Number (UPRN) to the Citizen Account (CA) and the Unique Citizen Reference Number (UCRN). This will provide a local infrastructure to maintain the link between customers and where they live (for service purposes), or properties and their respective owners.</p> <p>The ultimate aim of the programme is to be able to take a minimum set of data from each CAG in order to create a national repository of addressable properties, which will form part of the National Infrastructure. This dependence upon Councils to be a ‘trusted’ source of address-based data requires sustainable business processes and defined quality thresholds for property addressing. This will be essential if Councils, and the National Infrastructure, are to provide a ‘trusted’ property address service across the wider Scottish public sector, e.g. to the emergency services; across the wider UK public sector, e.g. for a UK wide address gazetteer; and the wider government market, e.g. to work in parallel with organisations such as Royal Mail and Ordnance Survey.</p>

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<p>(4) X- Ref / Relevance to the overall programme</p>	<p>A trusted public sector source for all data relating to a property life cycle</p> <p>Establishing a property address link for the core Citizen Account (CA) as part of the national Infrastructure</p> <p>An address link to the core CA to underpin the voluntary citizen’s entitlement card scheme</p> <p>A national repository for addressable properties</p> <p>A set of processes to help manage the local CA and a local customer relationship management (CRM) infrastructure.</p> <p>Delivering efficiencies and reducing the overhead of property and address management</p> <p>Securely - and with informed customer consent - sharing data and information across organisational boundaries</p> <p>Improving the public sectors capacity to share critical data and information</p>												
<p>(5) 2005/06 Timeline</p>	Apr 05	May 05	June 05	July 05	Aug 05	Sept 05	Oct 05	Nov 05	Dec 05	Jan 06	Feb 06	Mar 06	Apr 06
<p>(6a) X to mark milestones</p>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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<p>(6b) Milestones and Main activity / output at that date</p>	<p>May 2005 Complete review of “First Cut” CAG status for all 32 Councils</p> <p>June 2005 Define specification for CAG Quality Assurance software Scope business process requirements for sustainable CAG Scope business process requirements to maintain compatibility with Assessors, Royal Mail and Assessors data</p> <p>July 2005 Identify and agree ‘best fit’ data source for national Infrastructure Interim data set Transfer of best fit data to national infrastructure Define work package for managing relationship between Scottish developments and wider UK sector developments</p> <p>August 2005 Report on technical options / business model for national gazetteer Define data matching and cleansing requirements for national gazetteer development</p> <p>Sep 2005 Confirm completion of local CAG</p> <p>October 2005 Implement CAG quality assurance programme</p> <p>Nov 2005 Develop data matching and cleansing processes to incorporate CAG into national data set Develop business processes for secure messaging between CAG and national Infrastructure</p> <p>Feb 2006 Creation of Definitive National Address gazetteer v1</p>
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(1) Objective F	<i>To establish a procurement function that can deliver economies of scale in procuring goods and services for the Customer First programme and its partners.</i>													
(2) Owner	Improvement Service, Operational Services Directorate: Procurement Executive – Ivan Condon													
(3) More detailed description of Objective	<p>To ensure that the correct procurement arrangements are in place through the Improvement Service, to:</p> <ul style="list-style-type: none"> • Procure goods and services for its own requirements but also on behalf of Councils within the programme. • Provide specialist advice when buying goods and services for the Customer First programme • Ensure that Customer First receives best value for money in the procurement of goods and services. • Undertake negotiations with suppliers on all procurement issues. • Manage suppliers in the implementation of Customer First projects. • Manage all procurement including any tendering processes that will be required to deliver Customer First. • Ensure that appropriate financial records are kept and manage the Customer First budgets to ensure that expenditure is kept within the allocated budgets. 													
(4) Relevance to programme	<p>Procurement of:</p> <ul style="list-style-type: none"> • Smart cards for the national Entitlement card scheme • Contracting supplier to deliver Interim solution for the National Infrastructure • Bureau services for the production / distribution of the Entitlement card to support concessionary fares • Site review to determine requirements for 'live' operation of the national infrastructure • Contracting supplier for the development of the 'live' national infrastructure • Contracting suppliers for data matching and cleansing for national infrastructure • Provision of test and live solution for national authentication model 													
(5) Timeline 2005/06	Apr 05	May 05	June 05	July 05	Aug 05	Sept 05	Oct 05	Nov 05	Dec 05	Jan 06	Feb 06	Mar 06	Apr 06	
(6a) X to mark milestones	☒	☒	☒	☒	☒	☒	☒	☐	☒	☒	☐	☒	☒	

Customer First – Business Plan

<p>(6b) Milestones and Main activity / output at that date</p>	<p>April 2005 Ensure procurement arrangements are in place for the purchase of goods and supplies</p> <p>May 2005 Initiate procurement arrangements for Entitlement Cards Manage test of data being delivered by ATOS Confirm delivery requirements for Interim National Infrastructure (ATOS)</p> <p>June 2005 Manage tender process for data cleaning of test data for Interim national infrastructure Manage tender process for Entitlement Cards</p> <p>July 2005 Engage with local authorities and SOCITM on procurement for national Infrastructure and Bureau Services. Complete tender for 1.2 million Entitlement Cards.</p> <p>Aug 2005 Initiate tender process for software and hardware for National Infrastructure.</p> <p>Sept 2005 Complete investigation of suitability of GSI to deliver National Infrastructure and (Gateway) for authentication. Complete tender for initial bureau facilities for card production.</p> <p>Oct 2005 Initiate site visits / determine management arrangements for live national Infrastructure development Complete tender for bureau service for on-going production and maintenance of cards Produce financial monitoring report</p> <p>Dec 2005 Agree service level agreements for on-going production and maintenance of cards. Manage data cleaning contract.</p> <p>Jan 2006 Manage installation and testing of software for National Infrastructure.</p> <p>March 2006 Complete distribution of Entitlement Cards</p>
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Customer First – Business Plan

(1) Objective G	<i>Monitor progress and benefits realisation from Customer First to ensure that delivery of core service requests can be dealt with at first point of contact and efficiency savings can be measured.</i>
(2) Owner	Improvement Service, Operational Services Directorate: Programme Manager / Benefits Realisation – Tom McHugh
(3) More detailed description of Objective	<p>The Benefits Realisation process will support the delivery of the Customer First Business Plan by providing an agreed framework and set of outcome measures which will allow the Council to measure progress, and the Management Board to monitor the deliverables, from the Programme. The outcome measures and definitions will be agreed with Councils and the Scottish Executive (46 core services have already been agreed as areas to be targeted by Councils).</p> <p>An online monitoring system will be introduced in order to automate the information gathering and reporting process for the Programme. This is intended to reduce the overhead of carrying out Council surveys and the need for Council to respond periodically by having to produce electronic or paper-based returns to the Programme Office. It will also allow council to update their progress against a timeline defined by them.</p> <p>It is not the role of the Programme Office to scrutinise or to audit any information provided by Councils. Councils must be satisfied that their own internal control procedures are robust enough to stand up to any external independent scrutiny or review.</p>

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(4) Relevance to the programme	<p>Deliver more convenient and responsive public services</p> <p>Encourage the take up of online access (self-service) to key services</p> <p>Ensure that at least 75% of core service requests can be dealt with at first point of contact</p> <p>Measurable improvements coupled with efficiency savings for 46 core services</p> <p>Report on improved transactions in cash terms</p> <p>Improved customer satisfaction levels (target of 90%)</p>												
(5) Timeline 2005/06	Apr 05	May 05	June 05	July 05	Aug 05	Sept 05	Oct 05	Nov 05	Dec 05	Jan 06	Feb 06	Mar 06	Apr 06
(6a) X to mark milestones	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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<p>(6b) Milestones and Main activity / output at that date</p>	<p>Apr 2005 Undertake stakeholder consultation and engagement in development of Benefits Realisation Framework Discussion with Councils, Scottish Executive, and other appropriate organisations on outcome measurement</p> <p>May 2005 Establish Programme monitoring procedures for measuring first time delivery and efficiency savings Establish Programme Benefits Realisation Framework for reporting on benefits for each sub-programme and the overall Customer First Programme Build monitoring and benefits requirements into the business requirements for an online monitoring system Identify group of Councils who can deliver test data to the online system</p> <p>June 2005 Commission development work on online monitoring tool Publish first position report on Customer First Benefits Realisation Framework Define test requirements for online monitoring system</p> <p>July 2005 Initiate a wider Benefits Realisation Framework for the Improvement Service</p> <p>Aug 2005 Produce test report from online system Initiate live roll out of online system</p> <p>Sept 2005 Publish second position report on Customer First Benefits Realisation Framework Test live data and reporting procedures for the online system</p> <p>Dec 2005 Publish third position report on Customer First Benefits Realisation Framework Publish Test Benefits Realisation Report from online system for consultation with Councils</p> <p>March 2006 Publish national report on Customer First outcomes (performance and benefits realisation), to include final Electronic Service Delivery Report</p>
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Annex C – Risk Register

The table below represents only those risks that the Improvement Service Board, the Customer First Management Board and the Customer First Programme Office are in a position to manage, control or minimise. Individuals are identified as responsible for managing the risks, however, the Register also recognises that decisions will also be necessary at a Board level to approve actions that need to be taken by individuals. All risks are reviewed at least quarterly by Programme Managers for discussion by the Management Board.

Risks are classified as low, medium or high. The options for managing the risks are:

Tolerate it - because there is no cost effective control and the risk can be adequately monitored;

Transfer it - to another party, e.g. by contracting out;

Terminate it - by closing down the activity; or

Treat it - by taking appropriate action to manage the risk through the introduction of appropriate controls.

The actions required are dependent on the nature and impact of the risk and the extent to which the risk can be managed.

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
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The Customer First Programme						
1. Lack of support from partners undermines the programme.	M	Treat	Ensure that the Customer First Business Planning Framework is properly communicated and that partners respond by having their own framework.	Management Board / Jim Kinney / Scottish Executive	N/A	July 20 05
2. Lack of Political / Senior Management commitment stalls the programme.	M	Treat	Encourage high-level commitment at Ministerial, Elected Member and Chief Executive level through the IS Board, the Scottish Executive. Link the programme closely to the Efficient Govt / reform agenda and the IS Business Plan.	Management Board / Colin Mair / Jim Kinney	N/A	July 2005
3. The programme governance arrangements prove to be ineffective.	L	Treat	Ensure that clear terms of reference, responsibilities and accountability are established for the Management Board and all Sub-Boards, regular meetings are held and minutes taken / circulated, actions resulting from the Board are completed. All of the above should be properly communicated to Customer First partners.	Colin McKay / Jim Kinney	N/A	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
4. The governance arrangements at the local level prove to be ineffective.	M	Treat	Scottish Executive to ensure that each Council submits its local Customer First Business Plan / programme, Programme Managers report to their Sub-Programme Boards any weaknesses in the implementation of local programmes, SOLACE / COSLA exerts peer pressure on fellow Councils / Chief Executives	Scottish Executive, SRO's, Programme Managers	N/A	July 2005
5. High demand on Programme Managers to support partners prevents progress towards the 'real / tangible' programme outputs.	M/H	Treat	Align the roles and responsibilities of the Programme Managers to the Customer First Business Plan and to their own objectives as set out in the staff appraisal process	Jim Kinney	N/A	July 2005
6. Insufficient buy in from local authorities - at the service level end - because they see the agenda as a threat to their business.	M/H	Treat / Tolerate	Ensure that COSLA / SOLACE are kept up to date with progress and the Benefits Realisation programme clearly demonstrates the quantifiable benefits that are being achieved. Continually communicate with partners via newsletter / reports / Web	Management Board / Jim Kinney / Tom McHugh / Fiona Dick	N/A	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
7. Staff turnover / shortages reduce the capacity of the Programme Office to deliver the programme.	M	Treat	Align the Business Plan closely to strong project management to enable the early identification of resource / skill gaps in the Programme Team	Jim Kinney / Programme Managers	N/A	July 2005
8. Financial constraints prevent the development and roll out of planned products and outputs from the programme.	L/M	Treat	Align the business / project planning process to budgetary planning and monitoring process to identify early gaps in the programme. Report these gaps to the IS Board	Management Board / Jim Kinney	N/A	July 2005
9. A lack of demonstrable benefits from the programme is a barrier to the take up of the products and outputs from the programme.	L/M	Treat	Ensure that the communication and reporting process and the benefits realisation programme set out both the Ministerial / policy drive for the programme and the quantifiable benefits of the programme outcomes.	IS Board / Management Board / Jim Kinney / Tom McHugh / Fiona Dick	N/A	July 2005
National Infrastructure / Citizen Account						
10. Legal obstacles prevent the use of the GRO Central Register to seed the Citizen Account dataset.	M	Treat	Ensure that solicitors properly understand the scope of the programme, the accountability of the different partners and the purpose of the national infrastructure.	Duncan Macniven / Jim Kinney / Cameron Walker / Scottish Executive	Sep 2005	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
11. Data Protection obstacles (real or perceived) prevent the population of the national infrastructure (people and property).	M	Treat / Tolerate	Clearly identify the different sources of data, determine schedule for population (within scope of project plans) and identify and report real barriers.	Paul Nichol / Iain McKay / sub- Programme Boards	March 2006	July 2005
12. Contractor (ATOS) may not deliver the first phase of the national infrastructure in time	M	Treat / Transfer	Ensure that ATOS is contractually bound to deliver the product to the specification and the quality determined by the project plan and approved by the Management Board.	Cameron Walker	Sep 2005	July 2005
13. Programme may be accused of procuring the first phase of the national infrastructure outside the scope of the current NHS contract	L/M	Treat / Transfer	Take advice from NHS, specify contract within the scope of the NHS framework and IT environment, ensure Management Board understands and signs-off.	Cameron Walker / Management Board	June 2005	July 2005
14. Failure to agree on the development approach for the implementation of the national infrastructure could inhibit its progress.	M	Treat / Tolerate	Ensure that the options for the proposed infrastructure are properly set out, communicated and understood. Management Board to sign-off final specification	Jim Kinney / Cameron Walker / Management Board	March 2006	July 2005
15. The procurement and implementation of the first phase may not be completed in the timescales necessary to enable an interim Citizen Account for concessionary fare entitlement	H	Treat	Implement a contingency plan to provides for the procurement / implementation of an interim data set which ensure existing concessionary fare holders are not disadvantaged.	Paul Nichol / Cameron Walker / Ivan Condon	Oct 2005	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
16. Focus on concessionary travel data set detracts from the delivery of the first (Interim) phase of the national infrastructure and proof-of-concept projects.	L/M	Treat	Ensure that project plans are properly aligned, critical paths established and outputs clearly defined.	Cameron Walker / Paul Nichol	Oct 2005	July 2005
17. Perceived legal barriers to the use of the Citizen Account may act as a real barrier to the roll out of the national infrastructure.	M/H	Treat / Tolerate	Look at other best practice models (Reach), develop UCRN/CA Code of Practice, take advice from solicitors, communicate to programme partners	Cameron Walker / Paul Nichol / Ian Matheson (Legal services)	March 2006	July 2006
18. Interim phase of the National Infrastructure may be wasted investment if there are insufficient sources of quality data with which to create the definitive citizen account / property address.	M/H	Treat	Ensure that all relevant data sources are identified, quality assured and timescale drawn up for data matching and cleansing	Cameron Walker/ Paul Nichol / Iain McKay	March 2006	July 2005
19. Interim phase of the Infrastructure fails to deliver the business and technical requirements for the procurement, tendering and implementation and roll out of the 'live' system.	M	Treat	Agree, consult and communicate with partners at all stages of the Interim development. Produce early specification based upon the Reach model.	Cameron Walker / Ivan Condon	Sep 2005	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
20. Insufficient resources, skills and tools prevent the implementation of the 'live' system.	M	Treat / Transfer	Carry out technical assurance review as soon as possible and plan to go out to the marketplace to procure contractors for live system.	Jim Kinney / Cameron Walker / Ivan Condon	Sep 2005	July 2005
21. Councils fail to understand the 'bigger picture' and are unable to use the national infrastructure or implement the parallel requirements for their local infrastructure.	M/H	Treat / Tolerate	Consider developing tools and skills within a 'model' council(s) to act as a reference site for others.	Cameron Walker	N/A	July 2005
Entitlement Card Scheme						
22. Ministerial requirements for the Scheme are not properly defined and communicated.	M/H	Treat / Tolerate	Ensure appropriate feedback to Ministers and to Cabinet on the coverage and potential for the use of Entitlement Card. Communicate this to partners.	IS Board / Jim Kinney / Scottish Executive	N/A	July 2005
23. Concerns over the UK ID Card impacts upon the development and acceptance of the Scottish Entitlement Card Scheme	L/M	Treat / Tolerate	Set out and communicate the clear differences of the two separate approaches. Re-enforce this message at every opportunity.	Jim Kinney / Scottish Executive	N/A	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
24. Insufficient buy in from the Councils to develop the National Scheme	M/H	Treat / Transfer	Ensure support from COSLA / SOLACE and Improvement Service and communicate clearly to Councils the business benefits, timescales and phased roll out of the Scheme	Management Board / Jim Kinney / Sid Bulloch	N/A	July 2005
25. Timescales for the roll out of cards by March 2006 to accommodate concessionary fares is too tight.	H	Treat	Ensure that a clearly prioritised project plan sets out the short, medium and long-term deliverables for the Entitlement Card. Ensure that contingency measures exist to replace – as a minimum requirement – existing concessionary fares cards.	Sid Bulloch / Paul Nichol	March 2006	July 2006
26. Technical difficulties prevent the implementation of an agreed technical specification for the card	M/H	Treat / Tolerate	Specify a minimum requirement for the card to meet the current business needs of the Executive, Councils and the citizens who will use the card.	Sid Bulloch	June 2005	July 2005
27. Councils fail to associate the roll out of the Citizen Account with Entitlement Card scheme	M/H	Treat / Tolerate	Communicate clearly to Councils the overall scope of the Customer First programme and the positioning of the Entitlement Card within the programme.	Sub-Programme Board / Jim Kinney / Sid Bulloch / Paul Nichol	N/A	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
28. Other local card schemes feel threatened by the potential for the National Scheme to replace their own local systems	M/H		Communicate clearly the potential for the local schemes to be improved and enhanced by the establishment of a Scotland wide platform, e.g. transport season tickets; every citizen could automatically be a member of the library or the Council's leisure facilities.	Sid Bulloch	N/A	July 2005
29. Unable to get agreement on data sharing and consent	M/H		Work with solicitors to develop a standardised process and form of words that are acceptable for the CA.	Paul Nichol; Ian Matheson	Mar 2006	July 2005
30. Councils and SE Transport Division may not be able to agree on a standardised application form and enabling process to award the concessionary fare.	M	Treat	Set a deadline for agreement and escalate to Ministerial level if lack of agreement compromises the issue of the card	Jim Kinney / Tom MacDonald	July 2005	July 2005
31. Councils and SE Transport Division may not be able to agree on a common branding for the Entitlement Card.	M	Treat / Tolerate	Set a deadline for agreement and escalate to Ministerial level if lack of agreement compromises the issue of the card	Jim Kinney / Tom MacDonald	July 2005	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
32. Existing Transport Schemes do not consent to use local transport concession data as a data source for the new national scheme	M/H	Treat	Ensure Transport Div is able to put pressure or provide necessary data to ensure replacement card. If this fails initiate a new application process and communicate the requirements to potential customers as soon as possible	Tom Macdonald	July 2005	July 2005
33. Citizens with disabilities cannot be identified.	H	Treat	Ensure Transport Div is able to extract data from existing schemes. If this fails include disabled customers and qualification rules are set out in a new application process.	Tom Macdonald	Sep 2005	July 2005
34. Agreement cannot be reached on the use of the new national Entitlement Card for the concessionary fares.	L	Transfer	Transport Division will replace existing concessionary fare card with a new concessionary fare card.	Tom Macdonald	June 2005	July 2005
35. Resources and skills not available to validate forms and update national Citizens Account to flag consent	M	Treat	Agreement from Councils or their agencies that they will validate forms and send them to card producers.	Paul Nichol	Sep 2005	July 2005
36. The interim infrastructure / Citizen Account is not able to cope with changes i.e. Addresses, Deaths and Eligibility	H	Treat / Tolerate	Work with GROS to establish interim data matching / cleansing against the NHS/CR (or equivalent GROS data set).	Cameron Walker / Paul Nichol	Oct 2005	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
37. There will be a late flurry of demand for the Entitlement Card / Concessionary Fare and limited capacity to enable the Citizen Account and distribute the card	H	Treat	Ensure that a national publicity / awareness campaign is launched in good time to deal with every application.	Tom MacDonald	March 2006	July 2005
38. The 'preferred solution' for the Entitlement Card scheme will not be operational to deal with applications after April 2006	H	Treat / Tolerate	Maintain the Interim infrastructure / Citizen Account contingency arrangements	Cameron Walker / Paul Nichol	N/A	July 2005
39. The bureau service is unable to cope with the large production demands of the Entitlement Card / Concessionary Fare roll out	M	Treat / Transfer	Ensure that the tendering process and contractual arrangements enforce a minimum service level requirement and timescale for card production and distribution.	Sid Bulloch / Ivan Condon	Oct 2005	July 2005
CA/CRM						
40. Failure to secure agreement on the legal position on data sharing and consent regarding the UCRN, Citizen's Account and other data sources impacts on a common approach to the roll out of the local Citizen Account implementation	M/H	Treat	Develop UCRN/CA Code of Practice and communicate key messages/requirements consistently with key stakeholders	Scottish Executive/ Jim Kinney/ Cameron Walker/ Martin Brown	March 2006	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
41. Delays in securing agreement on the core national Citizen Account may impact on the ability to conclude work package to define the minimum requirements for the local Citizen Account	M/H	Treat	Liase closely with the National Infrastructure Programme and communicate progress to Councils.	Cameron Walker/ Martin Brown	March 2006	July 2005
42. Councils will not be able to agree the minimum and the overall requirements for the use of the Citizen Account locally	M/H	Treat	Progress work package and convene meeting of key stakeholders to consider and conclude local CA requirements taking account of national CA, work	Martin Brown	March 2006	July 2005
43. Councils will not develop their local infrastructure (CA/CRM) sufficiently enough to make the proper business use of the national and local CA	M/H	Treat	Audit all 32 Councils against key enablers to establish state of readiness to implement local CA	Martin Brown	N/A	July 2005
44. The development work on the common A-Z and Knowledge Base will be lost because Councils (other than those involved in the pilot) will not have developed a framework for the wider implementation and sustainability.	M/H	Treat / Tolerate	Ensure that there is Benefits Realisation Plan specifically, a clearly defined project and communications plan to articulate migration and sustainability issues that minimises and avoids duplication of effort and investment in existing A to Z work by councils locally.	Martin Brown/ A – Z and Knowledge Base Project Group	N/A	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
45. The development of common framework for A-Z and Knowledge Base may conflict with the Improvement Service's wider objectives / timescales on promoting Knowledge Management.	L	Treat	Open and maintain dialogue with The Improvement Service CEO and KM Development Manager to establish boundaries and touch points between respective KM projects	Martin Brown/ A – Z and IS Development Manager (when appointed)	N/A	July 2005
46. The development of accredited training programme for Customer Services staff – fails to take account of wider stakeholders' interests in terms of training models and approaches beyond those of the pilot Councils	M		Open and maintain dialogue with wider stakeholder interests and ensure balanced representation on project group to reflect differing training models and approaches. Ensure portability of common and core elements to avoid duplication of effort and investment in existing customer services training work	Martin Brown/ Accredited Training Programme Group / Lead Authority	N/A	July 2005
47. The development work for the accredited training programme for customer services staff may be lost because of a failure to address appropriately the requirements for migration and sustainability of the programme beyond the Councils involved in pilot	M	Treat	Ensure that the Benefits Realisation Plan, the project and the communications plan articulate migration and sustainability issues that prevent duplication of effort and investment in developing local customer services training programmes	Martin Brown/ Accredited Training Programme Group	March 2006	July 2005
Definitive National Addressing						

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
48. Councils do not make satisfactory progress in the creation and integration of their corporate address gazetteers.	M/H	Treat	Ensure that the local project plan accurately reflects timetable for implementation, monitoring reports are produced and an audit / scrutiny process is in place (with results published).	SRO / Iain McKay	March 2006	July 2005
49. Councils report that they have insufficient funding to complete the local corporate address gazetteer.	L	Treat	Ensure that spending is comparable to other Councils, that funding for the gazetteer has not been diverted to other projects, identify 'real' shortfall to SRO for reporting to Management Board.	SRO / Iain McKay	March 2006	July 2005
50. Councils do not achieve the benefits of the corporate address gazetteer because of a failure to make the details available to front-line services, and properly integrate with back office systems and services.	M/H	Treat / Tolerate	Ensure that local programme and project plans take proper account of the ongoing requirements of integration and that the benefits / evidence of service improvements to be gained are properly communicated.	Iain McKay	N/A	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
51. The quality and sustainability of the corporate gazetteer is insufficient to meet the demands of both the national infrastructure and the requirements of the Councils own local service delivery.	M	Treat	Ensure that Council meet a minimum level of requirements for the development, sustainability and transfer of address-based data (locally and nationally). Ensure that an audit / scrutiny process takes account of the key indicators that can be used to measure this.	Iain McKay	N/A	July 2005
52. The links between the Councils and the Assessors are not properly developed and managed	M	Treat	Ensure that both sets of project plans are properly aligned and the key dependencies between the respective projects are properly identified.	Iain McKay / SRO's	March 2006	July 2005
53. There is a conflict of interest between and duplication of effort / cost between the DNA work in Scotland and similar initiatives being proposed and developed at a wider UK level	M/H	Treat / Tolerate	Ensure that the ongoing work in Scotland is properly communicated to UK colleagues (and reciprocated) and that any conflict is reported to the IS Board for political intervention to be considered.	Colin McKay / Jim Kinney / SRO / Iain McKay	N/A	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
54. The wider benefits of corporate / Scotland wide gazetteers are not properly appreciated and developed to their full potential.	M/H	Treat / Tolerate	Ensure that other business opportunities are identified, proposals established and reported to the sub-programme Board, with recommendation for wider project (and their costs) reported to the Management Board for consideration.	Iain McKay / SRO	N/A	July 2005
Procurement						
55. Cost may exceed budgets because the exact details of products / services to be procured through Customer First are not currently known.	L/M	Treat	Ensure that programme project plans identify - as far as possible - the timing and potential costs of procurement. Report any potential shortfalls and include in Resource Report to the Management Board.	Ivan Condon / Programme Managers / Jim Kinney	N/A	July 2005
56. Cost of interim infrastructure solution to accommodate the needs of concessionary fares – may add to budgeted cost of Entitlement Card project.	M	Treat / Transfer	Identify and cost interim solution as soon as possible and identify likely impact to Management Board (for budget review) and to Transport Division (for cost contribution).	Ivan Condon / Jim Kinney / Tom Macdonald	March 2006	July 2005
57. Total cost of development and infrastructure for concessionary travel entitlement cards is still not known.	M/H	Treat	Complete design work, specification and tendering as soon as possible. Identify shortfall for inclusion of Resource report to Management Board.	Ivan Condon / Sid Bulloch / Paul Nicholl / Jim Kinney	March 2006	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
58. Total cost of development for national infrastructure, citizen account, messaging hub is still not known.	H	Treat	Complete design work, specification and tendering as soon as possible. Identify shortfall for inclusion of Resource report to Management Board.	Ivan Condon / Paul Nichol / Cameron Walker / Jim Kinney	March 2006	July 2005
59. Some councils may not except Improvement Service buying arrangements, as they don't conform to their financial regulations.	M	Treat	Keep Councils informed of the procurement plans and ensure that they report back immediately any local impact on the national plan.	Ivan Condon / Sid Bulloch	July 2005	July 2005
Benefits Realisation						
60. Councils may be reluctant to accept 'another' set of performance measures (the Benefits Realisation Framework)	M	Treat / Tolerate	Agree, through consensus, a workable benefits realisation framework which is SMART and meaningful.	Tom McHugh and LA's MGF Co-ordinators	N/A	July 2005
61. Potential conflict / mismatch in the requirements of the Benefits Realisation Framework compared to the requirements of the Scottish Executive Efficient Government Unit	L/M	Treat	Agree, through consensus, a workable benefits realisation framework that can input into Scottish Executive Efficient Government Unit requirements and vice versa	Tom McHugh / Craig Russell	N/A	July 2005
62. Councils may not be able to agree on standard definitions of 'first time' delivery.	M/H	Treat	Agree, through consensus, a standard definition based upon those councils who have already defined and are able to measure first time delivery.	Tom McHugh	March 2006	July 2005

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Risk	Likelihood / Impact	Response	Action required	Who's responsible	Date risk expires	Next review
63. Councils may insist that they will be unable to supply the necessary data to support the Benefits Realisation Process.	M/H	Treat	Ensure that baseline information is available from the Councils already in a position to supply the data and demonstrate to all Councils that data requirements are achievable.	Tom McHugh	March 2006	July 2005
64. Councils may not be able to agree on a standard approach to measuring Customer Satisfaction	L/M	Treat	Review the existing approaches to measuring Customer satisfaction and develop and agree a common set of measurements that can be promoted by the Improvement Service.	Tom McHugh / IS Development Manager (when appointed)	Dec 2006	July 2005
65. Councils may not accept definitions of cash releasing and time releasing savings.	M/H	Treat	Ensure that there is a consistency in approach and measurement between the Programme and the Scottish Executive Efficient Govt Group, and that this is properly communicated to Councils.	Tom McHugh / Craig Russell	March 2006	July 2006
66. Measurement of time / cash releasing savings may fall short of the predicted savings for the Customer First Programme	M	Treat / Tolerate	Ensure that performance is measured and targets revised, with reports prepared for the Management Board. Ensure that other qualitative benefits are illustrated in the report.	Tom McHugh / Jim Kinney	N/A	July 2005

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SERVICE ACTIVITY	SERVICE DESCRIPTION
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Annex D – Core Services

Leisure Services	
Leisure & Recreation – Booking and Payment of facilities	The booking and payment of all sporting activities provided by (or on behalf of) the Council
Public Library - Loans renewal/extending and reserving	Access to the full range of Council's Library Service for the loan, renewal, extending, reserving and payment of all products.
Financial Services	
Council Tax - Payment	The payment and recording of Council Tax
Council Tax - Entitlement	Council Tax enquires about Entitlement to Discounts/Exemptions and Relief.
Council Tax – Enquiry	General Council Tax enquiries. (e.g. Banding enquiry, individual account enquiries)
Council Tax - Benefit Enquiries and Applications	Enquiry, formal application and provisional award of Council Tax Benefit.
Housing Services	
Housing - Benefit Enquiries and Applications	Enquiry, formal application and provisional award of Housing Benefit.
Housing - Repairs Reporting	The request, processing and initiation of a Housing Repair
Housing - Repairs Status	Requesting the status of a Housing Repair
Housing - Rent Making a payment	The payment of rent for Council house
Housing - Applying for a house	Formal application for the request to obtain a Council house.
Housing - Waiting list enquiry (including points)	Information about the status on a Waiting List for a Council house. Specific information on the allocation of points.
Council - Notification change of address	Formal process to notify a citizen's change of address and for that change to be reflected across all Council systems.

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SERVICE ACTIVITY	SERVICE DESCRIPTION
Land and Property Services	
Planning - Application	The formal process for making a Planning Application to the Council.
Planning - Status of an application	Request on the status / progress of a Planning Application
Building Control - Making an application	Making a Building Control Application to the Council. The primary objective being the processing of building warrants and completion certificates.
Refuse Collection - When is refuse collected	Enquiries received and information provided on the collection of Business and Residential waste refuse.
Refuse Collection - Complaint	Formal complaint about the Business and Residential waste refuse not collected on a regular basis (collection not made as per Council's schedule) or the quality of the service.
Street Light Fault - Reporting	Formal reporting, recording and initiation of repairs to any defects and street lighting
Roads and Pavements Fault - Reporting potholes / pavements	Formal reporting, recording and initiation of repairs to any defects and faults relating to roads and pavements
Special Uplift - Requesting and Uplift Complete	Formal request, processing and payment to the Council in respect of Special Uplift. Full service provision includes completion of the request.

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SERVICE ACTIVITY	SERVICE DESCRIPTION
Environmental Services	
Pest Control - Request service	Request, processing and payment from citizens and businesses to deal with pests that are harmful to public health and well being.
Pest Control – Reporting	General reporting from citizens and businesses of pests that may be harmful to public health and well being and action taken by the Council
Education Services	
Education Grants - Clothing	Application, processing and provisional assessment for Education Clothing Grant to assist with the cost of school clothing for state-maintained school pupils whose families are receiving particular state benefits or have a low income.
Education - School Meals	Application, processing and provisional assessment for Free School Meals provided to children of families who are in receipt of appropriate social benefits.
Education - Transfer/Exchange of pupil information	Automated transfer and exchange of pupil information within a specific school and between schools
Education - Information for parents	Provision of information to parents specific to Education services
Education - Pupil registration and attendance management	Automatic recording and management reporting of pupil attendance.
Education – Lifelong Learning - Enquiries	Enquiries about learning activities provided by the Council or using Council facilities.
Education – Lifelong Learning - Bookings	Booking and payment for learning activities provided by the council or using Council facilities.

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SERVICE ACTIVITY	SERVICE DESCRIPTION
Social Work and Health Services	
Social Services - Aids and Adaptations to the home	Assessment and automated request for making changes and obtaining aids for people who need help around the home.
Social Services - Single Assessment	Automated single shared assessment process to determine, record and make referrals for the social care requirements of an individual.
Social Services - Domiciliary Care	Provision of home care and support to eligible people in their own home (by council staff or by a third party).
Social Services - Receiving services	Automated award, process and pay for the provision of social services.
Blue Badge - Application for	Automated application, assessment and award of a Blue Badge for may be eligible for disabled vehicle parking in appropriate areas.
Corporate Services	
Corporate Complaints	The process of dealing with complaints received from receipt of enquiry to resolution of complaint.
Council - Vacancies and Recruitment	Publication, application, acknowledgement and response to application for council vacancies / recruitment.
Registration - Births, Deaths and Marriages	Electronic registration and notification of births, deaths and marriages
Licensing -Taxi Driver	Automated application, processing, notification, recording and payment for authorisation of a licensed private hire vehicle.
Licensing - Street Trader	Automated application, processing, notification, recording and payment for authorisation as a Street Trader.
Licensing - Liquor Licence Application	Automated application / renewal, processing, notification, recording and payment for licence to sell alcohol in hotels, pubs, discos, restaurants and shops.

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SERVICE ACTIVITY	SERVICE DESCRIPTION
Economic Services	
Business Development Grants	Automated process for the application, processing, assessment and notification of the provision of grants to assist business development
Transportation Services	
Parking Fine - Paying	Processing, payment and recording of parking fines