

APPENDIX 1

Key Objective WM8:

To produce and deliver on an Improvement Plan for the Benefits Service that delivers a Benefits Service that is responsive to customer needs

Monthly Progress Update

Owner : Head of Finance, Revenues & Benefits

Date: 7 September 2009

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25.1 (R1)	Improve the management and collection of all Housing Benefit overpayments. Approval to combine recovery of overpaid HB in the HB section with the creation of a new post dedicated to this role. Ongoing Performance Development Team support to develop procedures. Target date January 2010 for transfer of debts from Income Recovery.														
R1a	Reviewing the roles and responsibilities for recovery.	David Taylor/ Jane Bough													Complete
R1b	Ensure that the resources needed are made available.	David Taylor/ Jane Bough													Job Description, Person Specification and advert written – SMT approval received – waiting on Union and re-deployment checks before advert placed – scheduled date for interview week commencing 30/11/09

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R1c	Reviewing debts and improving procedures for recovery, monitoring and management.	David Taylor/ Jane Bough													18/11/09 PDT discussing procedures and best practice in readiness for new post and transfer of recovery to HB section.
R1d	Review the write off policies and procedure.	David Riley													Ongoing process expanded from revenues only review to encompass all services. Draft policy being prepared with a February 2010 implementation target.
R1e	Effective prevention work to reduce overpayments arising, particularly LA Error overpayment.	David Taylor													Complete weekly measures in place to monitor – monthly reporting.
R1f	Improve information sent to customers so that underlying entitlement can be established.	Sandra Maddox													Complete -Customer letter updated, reminder to staff made, new Overpayment post to check that all debtors have had underlying entitlement applied
R1g	Need for an embedded mechanism to ensure that all debtors already on the sundry debtors system can be identified if they reclaim benefit.	Vicki Lewis David Taylor													Partially Complete - Report already written to identify invoices where HB reclaimed. Needs to be embedded.

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R2d	Clear measures of effectiveness.	David Taylor													To be Included in strategy New target date set for end of November following PDT visit.
R2e	Better targeting of resources and the maximisation of entitlement of benefit to vulnerable people.	David Taylor													Mapping data gathered – parts of Winyates to be targeted as first priority. Work with Age Concern to identify areas for Pension Credit take-up to follow. Requires Income Maximisation Posts to be in place.
25.3 (R3)	Improve the accessibility of the Service. Benefits appointments system and visits to be promoted in Redditch Matters and posters. Registered Social landlords advised of appointments system and home visits. Area to be identified in One Stop Shop for Benefit promotion.														
R3a	Seek customer and internal and external stakeholders' views for consideration in the design of the Service, to ensure it meets their needs.	David Taylor													Waiting for feedback from Income Maximisation group, next meeting 10/11/09 and from RSL's. Customer Feedback to follow.
R3b	Jointly working with public sector, voluntary and community organisations locally to improve the delivery of service	David Taylor													As above

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R3c	Develop relationship with Registered Social Landlords (RSL's) including verification.	David Taylor													First meeting held, next meeting to be held Jan 10. SLA for Redditch co-op Housing to become a designated office being drafted – they will e-mail evidence and use e-form.
R3d	Understanding and addressing the needs of disabled persons and vulnerable groups.	David Taylor													Work yet to commence on this area.
R3e	Promote the appointments system and home visits facility.	David Taylor/ Lynn Jones													Complete - Information about appointments and home visits to be included in advert in next Redditch matters and raised with RSL group.
25.4 (R4)	Ensure challenging service standards and performance targets are in place, that are relevant to customers needs. Service Plan in place. Action plans for the delivery of service standards delayed. Consultation with stakeholders started and customers to be involved via survey and/or participation group ready for inclusion in next years plans.														

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R4f	Greater transparency of performance will enable Councillors' challenge to be more effective which can help drive further improvement.	David Taylor/Teresa Kristunas													Benefit performance data more available. Regular feedback on performance. Complete?
R4g	Relate service costs directly to the outcomes and performance delivered, establishing whether improving value for money is being achieved.	Teresa Kristunas													Work commencing to identify service costs.
25.5 (R5)	Performance Improvement .														

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R5a	Improve claim processing performance.	Kerry Herbert													Average processing time for October was 9 days – but this was due to rent decrease for Council Tenants – this led to several thousand claims being treated as done in one day – underlying performance still not on target – high levels of changes being reported as people take on part time or temporary jobs.
R5b	Improve accuracy rate to above average performance.	Kerry Herbert													Needs to be reconsidered and new target date set – suggest end of February 2010 – no recent national performance figures available and need to be able to release Benefit Officer from processing to carry out accuracy checking.

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R5c	Improve Appeals performance in meeting its targets. The published target is to make a submission to the Tribunals Service within 28 days.	Sandra Maddox													Backlog of appeals cleared however still not meeting 28 day target. Target may need to be re-considered is it achievable? To be discussed with PDT during November visit when looking at Performance management.
R5d	Introduce a clear and cohesive approach to delivering improvement for customers. Create detailed improvement plans to manage and monitor improvement against key objectives, which have been informed by service users and stakeholders. Set realistic targets and milestones which support the aims of the Service and the Council.	David Taylor													Complete
25.6 (R6)	Service Planning Action plans not yet fully developed. Other issues will be addressed in the new Take-Up Strategy.														
R6a	Develop specific aims for the Benefits Service.	David Taylor/Teresa Kristunas													Complete

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R6b	Service Plan to be supported by a detailed action plan that identifies key activities, responsibilities and measures of success that can be recognised by customers. These should address problem areas and have specific and measurable targets, linked to staff objectives.	David Taylor													Action plans delayed – however performance appraisals have been undertaken linking to service priorities and recent work has been undertaken to promote payment of HB into bank account. May be best to link to new year service plan.
R6c	Involve staff in setting future priorities and objectives for the Service, to shape the immediate future of the Service.	David Taylor/Teresa Kristunas													Staff will be involved in setting new priorities and objectives for 2010 – dependant upon service plan development cycle.

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R6d	The Service should specifically acknowledge how it will support and contribute to the priorities of the Worcestershire LAA; reducing the proportion of children in poverty, increasing the number of vulnerable people who are supported to maintain independent living and successful new claims generated for Pension Credit, Attendance Allowance and Disability Living Allowance.	David Taylor/Teresa Kristunas													New Service plan can be more directly linked to these themes. New Income Maximisation Officer posts to help with new claims for AA and DLA and Child Tax Credit. Child Benefit disregard in Oct 09 will increase numbers of families entitled to HB/CTB – complete when new service plan and Take-up strategy finalised?
25.7 (R7)	Performance Management Data in support of performance targets for individual members of staff still being compiled – Performance Development Team (PDT) supporting.														
R7a	The Overview and Scrutiny Committee is not sufficiently involved in overseeing the management of performance. There should be a greater emphasis on performance analysis against existing policies and obligations rather than future policy development. Increase the role of the Portfolio Holder in performance management	David Taylor/Teresa Kristunas													O and S to consider? There is now regular feedback on performance and the portfolio holder has an increased role through new performance management framework. Complete?

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R7b	Improve Performance management arrangements at service level. Introduce staff performance appraisals and individual or team targets for processing staff. Measure productivity systematically. Embed new performance management.	David Taylor													Time set aside during November visit of PDT for work to be completed. Data being analysed to set individual targets – feedback already given to processing staff on their current performance.
R7c	Limited up to date management information is available to senior managers and Councillors to assess variations in performance	David Taylor/Teresa Kristunas													Complete
R7d	Introduce regular reporting of current performance to customers against either the corporate Customer Service Standards or the Service targets.	David Taylor/Lynn Jones													Delays getting information onto new website and getting information to OSS. Website to be updated with more recent information and a further meeting to be arranged with Lynn Jones to enable OSS to show performance data.

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R7e	Ensure future demand and the potential impact of take-up campaigns and external economic circumstances are regularly evaluated to support future planning and resource management. Map demand to identify peaks and troughs to ensure adequate processes are in place to forecast future demand	David Taylor													Basic monitoring already under way – County unemployment data analysed to help predict future demand. Expected small increase following November legislation changes and nationally predicted that numbers will increase again over the winter.
R7f	There are not yet robust, formally adopted SMART (specific, measurable, attainable, resourced and time-based) plans in place to give clear structure to the delivery of improvement.	Teresa Kristunas													Complete
25.8 (R8)	Customer Information On target – not due till later in the year.														

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R8a	Information provided is not easy for customers to understand and does not help claimants to provide all of the evidence required, leading to excessive appeals and reconsiderations. Customers are providing evidence after the decision date which is resulting in a change to the decision.	David Taylor													Not due until May 2010
R8b	Increase understanding of the reasons for the high number of unsuccessful and defective (incomplete) claims	David Taylor													PDT helping compile Performance Management framework to include a measure to identify defective claim rate.
25.9 (R9)	Customer led Improvement On target – not due till later in the year.														
R9a	The Service does not systematically measure customer satisfaction on an ongoing basis.	David Taylor													Customer satisfaction survey to be carried out in November – linked to R9c could be carried out at same time. Potential to add survey to end of e-claim form.

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R9b	The Service cannot clearly demonstrate that it has delivered significant improvements in outcomes for service users.	David Taylor/Teresa Kristunas													Not due until May 2010
R9c	Introduce a formal mechanism to use customer feedback as part of the service planning used to improve the Service. E.g. fast-tracking in One Stop Shop. The changes should clearly demonstrate what impact they have had.	David Taylor/Lynn Jones													Initial survey supported implementation of electronic claims forms – follow up survey planned to be included in service plans. Need to introduce formal feedback system.
R9d	A benefits realisation methodology should be applied to demonstrate Think Lean improvements are proportionate to the resources used and lead to outcomes for the customer as a direct result.	David Taylor/Karen Jones													NVQ being undertaken to apply lean techniques to evidence gathering – will record outcomes for customers.
25.10 (R10)	Customer Access Benefits appointments system and visits to be promoted in Redditch Matters and posters. Registered Social landlords advised of appointments system and home visits. Area to be identified in One Stop Shop for Benefit promotion.														

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R10a	Improve telephone access. Calls put on hold or not answered at all. Customer service staff unable to contact Benefits quickly to ask for detailed advice. There is no systematic monitoring of abandoned calls.	David Taylor/ Lynn Jones													Basic monitoring underway – looking into improved reporting from system.
R10b	The appointments system in the Benefits Service is not operating effectively and it is difficult for users of the One Stop Shop to meet face to face with benefits assessors.	David Taylor/ Lynn Jones													Staff taking part in NVQ in Business Change Management – starting end of Sept. member form OSS also included – will look at problem and identify best solution. SLA to be re-drafted to cover this issue. NVQ will be completed by end of November – meeting to be arranged with Lynn Jones to progress.
R10c	Leaflets and forms are not readily available in the One Stop Shops. Customers have to request them.	David Taylor/ Lynn Jones													Area in OSS for Benefits to have posters and leaflets yet to be identified. To be addressed by further meeting with Lynn Jones.

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R10d	Benefits Service has not yet identified its hard to reach groups. Not due till July 2010.	David Taylor													Not due until July 2010
R10e	The Service has not formally assessed whether all users have fair and equal access to the Service and its policies.	David Taylor													Linked to completion of Equalities Impact Assessment. New e-claim form will have ethnicity monitoring reports included.
R10f	Some vulnerable claimants are receiving a slower service than other claimants.	David Taylor													Work not yet started to identify claims and understand what caused delays.
25.11 (R11)	Value for Money Work ongoing. Some comparators obtained continuing to source others.														
R11a	Demonstrate improved outcomes that have arisen from actively exploring opportunities to work in partnership to deliver financial efficiencies	David Taylor/Teresa Kristunas													Shared Service
R11b	The Benefits Services' net cost per head of population is lower than average and satisfaction is higher than average, but processing times are slow when compared to its statistical nearest neighbours.	David Taylor/Teresa Kristunas													DWP still not published performance data to enable bench marking.

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R11c	Compare costs to other services, calculate unit costs and seek to evaluate cost effectiveness.	David Taylor													Waiting for information back from meeting in October where county wide performance data and outline costs pro forma discussed – dependant upon authorities agreeing data to be measured and providing data.
R11d	Create robust proposals for delivering efficiency savings. Identify areas for efficiency savings that are cash-able and sustainable.	David Taylor													Not due until 31/03/2010 Shared service. E-claim form and BACS take-up.
R11e	Future investment proposals should demonstrate an awareness of linking improvement in performance to value for money	David Taylor/Teresa Kristunas													
25.12 (R12)	Training Work ongoing, due later in year.														

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R12a	Develop a training plan that gives clear details of the cost of training, what the objective of the training is, or how its effectiveness will be determined. Create a transparent and prioritised system for identifying individuals who need particular training.	Kerry Herbert / Sandra Maddox / Shona Knight													To be looked at later in year ready for new year. On-line software to identify training needs in place – training plan for year devised – need to pull together into a plan with expected outcomes.
25.13 (R13)	System and System Reports Local Authority error on target – only partial improvement on other areas due to capacity. Due later in year.														
R13a	Improve data assurance in the process for compiling the performance indicators.	David Taylor / Sandra Maddox													Review of roles within team to help check data – capacity issue – intended to move processing officer into Controls team to support this area.

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R13b	Improve HB/CTB Subsidy Claim processes. Introduce testing of software releases and regular testing of claim accuracy during the year to ensure that subsidy calculation is accurate.	David Taylor /Ian Sprott													LA error on target and tested – only limited improvement elsewhere but reconciliation spreadsheet compiled for 2008/09 claim. Capacity issue to be looked at as part of review of how teams organised within the service. Audit Commission have requested further checking so still some issues but they advise that due to new audit methodology more likely to pick up an error which requires further testing.

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R13c	IBS and Anite are not being used to best effect.	David Taylor /Vicki Lewis													Not due until 2010 but any areas identified for quick wins implemented – NVQ project to improve Anite letter requesting further information – standardised paragraphs to same time and ask for same information. Investigating input of forms directly into processing software to avoid typing in names and addresses etc.