#### 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

| Programmed dates      |  |
|-----------------------|--|
| On target             |  |
| One month behind      |  |
| Over one month behind |  |
| Reprogrammed/extended |  |
| Suspended             |  |
|                       |  |

| Ref.         | Action   | Lead                        | April | May     | June    | July   | Aug   | Sep   | Oct  | Nov    | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action   |
|--------------|--|-----------------------------|-------|---------|---------|--------|-------|-------|------|--------|-----|-----|-----|-----|--|
| 25.1<br>(R1) | Improve the management and the HB section with the creation of a procedures. Target date January | a new post dedi             | cated | I to th | is role | e. Ong | going | Perfo | rman | ice De |     |     |     |     |  |
| R1a          | Reviewing the roles and responsibilities for recovery.   | David Taylor/<br>Jane Bough |       |         |         |        |       |       |      |        |     |     |     |     | COMPLETED  |
| R1b          | Ensure that the resources needed are made available.   | David Taylor/<br>Jane Bough |       |         |         |        |       |       |      |        |     |     |     |     | Interviews for overpayment post to be held on 11/12 Feb.   |
| R1c          | Reviewing debts and improving procedures for recovery, monitoring and management.                | David Taylor/<br>Jane Bough |       |         |         |        |       |       |      |        |     |     |     |     | Three month extension requested to complete improved procedures. Completed as far as possible without a post in place. |

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

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref. | Action  | Lead                        | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action  |
|------|---|-----------------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|---|
| 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 February 2010.                          |
| R1e  | Effective prevention work to reduce overpayments arising, particularly LA Error overpayment.  | David Taylor                |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED Weekly measures in place to monitor with monthly reporting.   |
| R1f  | Improve information sent to customers so that underlying entitlement can be established.  | Sandra<br>Maddox            |       |     |      | _    |     |     |     |     |     |     |     |     | COMPLETED 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<br>David Taylor |       |     |      |      |     |     |     |     |     |     |     |     | Partially Complete - Report already written to identify invoices where HB reclaimed. Will become embedded when the debts are transferred.         |

**Monthly Progress Update** 

Owner: Head of Finance, Revenues & Benefits

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref.         | Action   | Lead                                 | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action   |
|--------------|--|--------------------------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|--|
| R1h          | Overall profile of the historic debt is not reported or regularly monitored.           | Mandy<br>Vernon/<br>Sandra<br>Maddox |       |     |      |      |     |     |     |     |     |     |     |     | On target. Regular reports to be scheduled to run.   |
| R1i          | Create a SMART plan to improve overpayment recovery.                                   | David Taylor                         |       |     |      |      |     |     |     |     |     |     |     |     | Smart plan to be finalised when post in place. With new post there will be more than double the resources devoted to recovery of these debts.  Interviews to be held 11/12 February. |
| 25.2<br>(R2) | Increase income levels of the profess defined, work ongoing with Pe                    |                                      |       |     |      |      |     |     |     |     |     |     |     |     |  |
| R2a          | Compile a description of roles and responsibilities to introduce Take-<br>Up Strategy. | David<br>Taylor/Teresa<br>Kristunas  |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED  |

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: January 2010

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref. | Action   | Lead                                | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action  |
|------|--|-------------------------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|---|
| R2b  | Dates of activity and events agreed with partners and other stakeholders.                          | David<br>Taylor/Teresa<br>Kristunas |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED Strategy includes target dates for activities and events.   |
| R2c  | Better use of local demographic information to help identify potential areas of under-claiming.    | David<br>Taylor/Teresa<br>Kristunas |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED   |
| R2d  | Clear measures of effectiveness.   | David Taylor                        |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED Included in strategy.   |
| R2e  | Better targeting of resources and the maximisation of entitlement of benefit to vulnerable people. | David Taylor                        |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED Income Maximisation Posts now in place. Using data maps to target certain areas for take-up work. |

**25.3 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.

**Monthly Progress Update** 

Owner: Head of Finance, Revenues & Benefits

| Programmed dates      |  |
|-----------------------|--|
| On target             |  |
| One month behind      |  |
| Over one month behind |  |
| Reprogrammed/extended |  |
| Suspended             |  |

| Ref. | Action  | Lead         | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action   |
|------|---|--------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|--|
| 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 |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED Income Maximisation Group and RSL views sought. Customer survey commenced for 2 months – results to follow Feb 2010. Staff and other internal stakeholders to be involved in service design. |

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

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref. | Action   | Lead         | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action   |
|------|--|--------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|--|
| R3b  | Jointly working with public sector, voluntary and community organisations locally to improve the delivery of service | David Taylor |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED Closer working with Age Concern agreed – Income Maximisation posts to work from Age Concern offices part of the week to help complete DLA and AA forms. Accommodation problems prevent this from happening currently with CAB but other closer working to be investigated – i.e. e-mail referrals for debt advice. |
| R3c  | Develop relationship with Registered Social Landlords (RSL's) including verification.                                | David Taylor |       |     |      |      |     |     |     |     |     |     |     |     | Quarterly meetings being held with RSL's.  SLA with Redditch Co-Op Housing at draft stage.   |

**Monthly Progress Update** 

Owner: Head of Finance, Revenues & Benefits

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref. | Action  | Lead                                | April | May  | June  | July | Aug    | Sep    | Oct   | Nov    | Dec    | Jan   | Feb   | Mar    | Comment /<br>Corrective Action  |
|------|---|-------------------------------------|-------|------|-------|------|--------|--------|-------|--------|--------|-------|-------|--------|---|
| R3d  | Understanding and addressing the needs of disabled persons and vulnerable groups.   | David Taylor                        |       |      |       |      |        |        |       |        |        |       |       |        | Work commenced Jan<br>2010 – new Income<br>Maximisation posts to<br>identify any problems.<br>Take-up strategy has<br>specific action to support<br>this. |
| R3e  | Promote the appointments system and home visits facility.   | David Taylor/<br>Lynn Jones         |       |      |       | _    |        |        |       |        |        |       |       |        | COMPLETED Information about appointments and home visits included in adverts and already raised with RSL and private landlord groups.                     |
| 25.4 | Ensure challenging service sta  | andards and                         | perfo | rmai | nce t | arge | ts are | e in p | olace | , tha  | t are  | relev | ant t | o cu   |   |
| (R4) | Service Plan in place. Action plans involved via survey and/or participa  |                                     |       |      |       |      |        |        |       | tation | with s | takeh | older | s staı | rted and customers to be  |
| R4a  | Develop service standards and performance targets through consultation with key stakeholders including customers, partners and Councillors. | David<br>Taylor/Teresa<br>Kristunas |       |      |       |      |        |        |       |        |        |       |       |        | Ongoing consultation taking place which will be incorporated in new service plans.  |

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

| Programmed dates      |  |
|-----------------------|--|
| On target             |  |
| One month behind      |  |
| Over one month behind |  |
| Reprogrammed/extended |  |
| Suspended             |  |

| Ref. | Action   | Lead                                | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action   |
|------|--|-------------------------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|--|
| R4b  | Promote standards to customers and regularly monitor performance against standards and targets and report results to customers, senior managers and Councillors. | David Taylor                        |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED Agreed that Benefit performance data will be included on TV in OSS. Website updated to show performance against standards. Reports made to senior managers and councillors.    |
| R4c  | Ensure that the Service has robust plans to deliver the standards and targets.   | 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. |
| R4d  | Ensure that the Service has the capacity to deliver them.  | David Taylor                        |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED  |
| R4e  | Greater clarity for both internal and external customers as to what the Service is aiming to achieve.  | David<br>Taylor/Teresa<br>Kristunas |       |     |      | _    |     |     |     |     |     |     |     |     | COMPLETED  |

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

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

|              |  | I                                   | 1     |     | ┌─╙  |      |     | ı   | ı   |     |     | ı   | 1   |     | 1   |
|--------------|--|-------------------------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|---|
| Ref.         | Action   | Lead                                | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action                      |
| R4f          | Greater transparency of performance will enable Councillors' challenge to be more effective which can help drive further improvement.      | David<br>Taylor/Teresa<br>Kristunas |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED  Benefit performance data more available. |
| R4g          | Relate service costs directly to the outcomes and performance delivered, establishing whether improving value for money is being achieved. | Teresa<br>Kristunas                 |       |     |      |      |     |     |     |     | _   |     |     |     | Work underway to identify service costs.            |
| 25.5<br>(R5) | Performance Improvement .  | <u> </u>                            | 1     | 1   |      |      |     |     |     |     |     |     |     |     | 1   |

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

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref. | Action  | Lead             | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action  |
|------|---|------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|---|
| R5a  | Improve claim processing performance.   | Kerry Herbert    |       |     |      |      |     |     |     |     |     |     |     |     | Average processing time improved to 14 days in January 2010.  NVQ identified alternative method of working which may improve performance.   |
| R5b  | Improve accuracy rate to above average performance.   | Kerry Herbert    |       |     |      |      |     |     |     |     |     |     |     |     | Needs to be reconsidered - new target date set for 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. |
| R5c  | Improve Appeals performance in meeting its targets. The published target is to make a submission to the Tribunals Service within 28 days. | Sandra<br>Maddox |       |     |      |      |     |     |     |     |     |     |     |     | Still not meeting 28 day target. Extension requested  |

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

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref.         | Action   | Lead                                | April  | May    | June   | July   | Aug     | Sep  | Oct   | Nov     | Dec   | Jan  | Feb   | Mar    | Comment /<br>Corrective Action |
|--------------|--|-------------------------------------|--------|--------|--------|--------|---------|------|-------|---------|-------|------|-------|--------|--------------------------------|
| 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                        |        |        |        |        |         |      |       |         |       |      |       |        | COMPLETED                      |
| 25.6<br>(R6) | Service Planning Action plans n  | ot yet fully deve                   | eloped | d. Oth | er iss | sues v | vill be | addr | essec | d in th | e new | Take | -Up S | Strate | gy.                            |
| R6a          | Develop specific aims for the Benefits Service.  | David<br>Taylor/Teresa<br>Kristunas |        |        |        |        |         |      |       |         |       |      |       |        | COMPLETED                      |

**Monthly Progress Update** 

Owner: Head of Finance, Revenues & Benefits

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref. | Action  | Lead                                | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action   |
|------|---|-------------------------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|--|
| 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. Detailed action plans to be linked to next year's service plan. |
| R6c  | Involve staff in setting future priorities and objectives for the Service, to shape the immediate future of the Service.  | David<br>Taylor/Teresa<br>Kristunas |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED Staff have been involved in setting new priorities and objectives for 2010/11.   |

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

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref.         | Action  | Lead                                | April | May   | June   | July   | Aug    | Sep     | Oct   | Nov   | Dec      | Jan      | Feb     | Mar   | Comment / Corrective Action  |
|--------------|---|-------------------------------------|-------|-------|--------|--------|--------|---------|-------|-------|----------|----------|---------|-------|--|
| 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<br>Taylor/Teresa<br>Kristunas |       |       |        |        |        |         |       |       |          |          |         |       | New Service plan (due in April 2010 will directly link to these themes.  Staff have been consulted and draft Service Plan 2010-11 in process.  Income Maximisation Officer posts to help with new claims for AA and DLA and Child Tax Credit.  Take up strategy completed. |
| 25.7<br>(R7) | Performance Management Date Development Team (PDT) supporting   |                                     | perfo | rmano | ce tar | gets f | or inc | lividua | al me | mbers | s of sta | aff stil | ll bein | g cor | Ta<br>cc   |

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

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref. | Action  | Lead                                | April | May | June | AInr | BuB | Sep | Oct | VOV | Dec | Jan | Feb | Mar | Comment / Corrective Action  |
|------|---|-------------------------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|--|
| 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<br>Taylor/Teresa<br>Kristunas |       |     |      |      | _   |     |     |     | ?   |     |     |     | There is now regular feedback on performance and the portfolio holder has an increased role through new performance management framework. Referred back to O and S by Executive for their comment. |
| 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                        |       |     |      |      |     |     |     |     |     |     |     |     | Data being analysed to set individual targets.  Feedback 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<br>Taylor/Teresa<br>Kristunas |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED  |

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

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref. | Action  | Lead                        | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action  |
|------|---|-----------------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|---|
| R7d  | Introduce regular reporting of current performance to customers against either the corporate Customer Service Standards or the Service targets.   | David Taylor/<br>Lynn Jones |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED Web site and OSS TV updated to show performance data for 2009-10.  New performance measures for 2010-11 will be shown on TV and Website from April 2010 |
| 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. Caseload numbers and types monitored monthly.               |

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

| Programmed dates      |  |
|-----------------------|--|
| On target             |  |
| One month behind      |  |
| Over one month behind |  |
| Reprogrammed/extended |  |
| Suspended             |  |

| Ref.         | Action  | Lead                | April  | May   | June  | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action  |
|--------------|---|---------------------|--------|-------|-------|------|-----|-----|-----|-----|-----|-----|-----|-----|---|
| 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<br>Kristunas |        |       |       |      |     |     |     |     |     |     |     |     | COMPLETED   |
| 25.8<br>(R8) | Customer Information On target  | et – not due till l | ater i | n the | year. |      |     |     | L   |     |     |     | L   | L   | 1   |
| 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        |        |       |       | _    |     |     |     |     |     |     |     |     | Work underway, including telephoning customers to explain queries and advising to provide information within 7 days of claim receipt. This will reduce the number of decision changes. Not due until May 2010 |
| R8b          | Increase understanding of the reasons for the high number of unsuccessful and defective (incomplete) claims   | David Taylor        |        |       |       |      |     |     |     |     |     |     |     |     | COMPLETED Analysis of defective claims complete. New method (above) being trialled to reduce number of defective claims.  |

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

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref.         | Action  | Lead                                | April   | May   | June   | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action                                   |
|--------------|---|-------------------------------------|---------|-------|--------|------|-----|-----|-----|-----|-----|-----|-----|-----|--|
| 25.9<br>(R9) | Customer led Improvement O  | n target – not di                   | ue till | later | in the | year |     | 1   |     |     |     |     | 1   | 1   |  |
| R9a          | The Service does not systematically measure customer satisfaction on an ongoing basis.  | David Taylor                        |         |       |        |      |     |     |     |     |     |     |     |     | COMPLETED Customer satisfaction survey completed.                |
| R9b          | The Service cannot clearly demonstrate that it has delivered significant improvements in outcomes for service users.  | David<br>Taylor/Teresa<br>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 | David Taylor/<br>Lynn Jones         |         |       |        |      |     |     |     |     |     |     |     |     | COMPLETED Survey completed as per R9a. Survey analysis complete. |
|              | changes should clearly demonstrate what impact they have had.   |                                     |         |       |        |      |     |     |     |     |     |     |     |     | Periodic surveys to be undertaken to inform service plans.       |

**Monthly Progress Update** 

Owner: Head of Finance, Revenues & Benefits

| On target One month behind Over one month behind |
|--|
|  |
| Over one month behind                            |
|  |
| Reprogrammed/extended                            |
| Suspended  |

| Ref.           | Action  | Lead                         | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action   |
|----------------|---|------------------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|--|
| 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/<br>Karen Jones |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETED  NVQ completed for lean techniques to evidence gathering – will record outcomes for customers. New proformas created to record outcomes and processes. |
| 25.10<br>(R10) | Customer Access Benefits appointments system an   |                              |       |     |      |      |     |     |     |     |     |     |     |     | gistered Social landlords  |
| 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/<br>Lynn Jones  |       |     |      |      |     |     |     |     |     |     | _   |     | Monthly monitoring of telephones data commenced – more detailed reports to be investigated.  |

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

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref. | Action  | Lead                        | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action   |
|------|---|-----------------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|--|
| 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/<br>Lynn Jones |       |     |      |      |     |     |     |     |     |     |     |     | Appointments promoted. SLA to be revised to set out when Benefit staff should meet with Customer Service staff. Outline discussed with Lynn Jones 03/02/10.              |
| R10c | Leaflets and forms are not readily available in the One Stop Shops. Customers have to request them.   | David Taylor/<br>Lynn Jones |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETE Area in OSS for Benefits to have posters and leaflets identified – OSS area to be refreshed in Feb 2010 Joint information board discussed with housing options. |
| R10d | Benefits Service has not yet identified its hard to reach groups.  Not due till July 2010.  | David Taylor                |       |     |      |      |     |     |     |     |     |     |     |     | Not due until July 2010  |

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

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref.           | Action  | Lead                                | April  | May    | June  | July    | Aug   | Sep   | Oct   | Nov  | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action   |
|----------------|---|-------------------------------------|--------|--------|-------|---------|-------|-------|-------|------|-----|-----|-----|-----|--|
| 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<br>Equalities Impact<br>Assessment. New e-<br>claim form (due March<br>2010) has ethnicity and<br>disability monitoring<br>reports included. |
| R10f           | Some vulnerable claimants are receiving a slower service than other claimants.  | David Taylor                        |        |        |       |         |       |       |       |      |     |     |     |     | Original target date of Nov 2009 missed – Income Maximisation posts to identify any problems.  |
| 25.11<br>(R11) | Value for Money Work ongoing.   | Some comparat                       | tors o | btaine | ed co | ntinuii | ng to | sourc | e oth | ers. |     |     |     |     |  |
| R11a           | Demonstrate improved outcomes that have arisen from actively exploring opportunities to work in partnership to deliver financial efficiencies | David<br>Taylor/Teresa<br>Kristunas |        |        |       |         |       |       |       |      |     |     |     |     | Shared Service agenda<br>Shared training with<br>Bromsgrove and Wyre<br>Forest.  |

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

| On target One month behind Over one month behind Reprogrammed/extended Suspended | Programmed dates      |
|--|-----------------------|
| Over one month behind  Reprogrammed/extended                                     | On target             |
| Reprogrammed/extended  | One month behind      |
|  | Over one month behind |
| Suspended  | Reprogrammed/extended |
| Caopenaca  | Suspended             |

| Ref. | Action   | Lead                                | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action   |
|------|--|-------------------------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|--|
| 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<br>Taylor/Teresa<br>Kristunas |       |     |      |      |     |     |     |     |     |     |     |     | DWP still not published performance data to enable bench marking. Further comparative analysis to be undertaken.   |
| R11c | Compare costs to other services, calculate unit costs and seek to evaluate cost effectiveness.   | David Taylor                        |       |     |      |      |     |     |     |     |     |     |     |     | Ongoing – delays getting detailed costs together and persuading other authorities to share data – extension requested until after next County group meeting. |
| R11d | Create robust proposals for delivering efficiency savings. Identify areas for efficiency savings that are cash-able and sustainable.   | David Taylor                        |       |     |      |      |     |     |     |     |     |     |     |     | Shared service.<br>E-claim form and BACS<br>take-up.   |
| R11e | Future investment proposals should demonstrate an awareness of linking improvement in performance to value for money   | David<br>Taylor/Teresa<br>Kristunas |       |     |      |      |     |     |     |     |     |     |     |     | COMPLETE Evaluating performance improvements that may be possible before purchasing additional software  |

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

| Programmed dates      |
|-----------------------|
| On target             |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |
|                       |

| Ref.           | Action  | Lead   | April | May    | June  | July | Aug    | Sep    | Oct   | Nov    | Dec    | Jan     | Feb   | Mar    | Comment /<br>Corrective Action   |
|----------------|---|--|-------|--------|-------|------|--------|--------|-------|--------|--------|---------|-------|--------|--|
| 25.12<br>(R12) | Training Work ongoing, due later  | in year.   |       |        | 1     | 1    | 1      | 1      | 1     |        |        |         |       |        |  |
| 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<br>/ Sandra<br>Maddox/<br>Shona Knight |       |        |       |      |        |        |       |        |        |         |       |        | COMPLETE Overarching training plan has been drafted. On target for April 2010.   |
| 25.13<br>(R13) | System and System Reports   | _ocal Authority                                      | error | on tar | get – | only | partia | l impr | rovem | nent o | n othe | er area | as du | e to c | apacity. Due later in year.  |
| R13a           | Improve data assurance in the process for compiling the performance indicators.   | David Taylor<br>/Sandra<br>Maddox                    |       |        |       |      |        |        |       |        |        |         |       |        | Review of roles within team to help check data – capacity issue – intended to move processing officer into Controls team to support this area. |

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

| On target One month behind |
|----------------------------|
| One month behind           |
| erie ilienali seriila      |
| Over one month behind      |
| Reprogrammed/extended      |
| Suspended                  |

| Ref. | Action   | Lead                        | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action  |
|------|--|-----------------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|---|
| 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<br>/lan Sprott |       |     |      |      |     |     |     |     |     |     |     |     | LA error on target and tested – only limited improvement elsewhere. Previous year audit qualified and additional testing may be required by DWP – Capacity issue to be looked at as part of review of how teams organised within the service. Look at options to provide more dedicated resource – pay IBS to carry out checks, work with another authority or use existing staff |

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

| On target             |
|-----------------------|
|                       |
| One month behind      |
| Over one month behind |
| Reprogrammed/extended |
| Suspended             |

| Ref. | Action   | Lead                         | April | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Comment /<br>Corrective Action  |
|------|--|------------------------------|-------|-----|------|------|-----|-----|-----|-----|-----|-----|-----|-----|---|
| R13c | IBS and Anite are not being used to best effect. | David Taylor<br>/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 save time and ask for consistent information. Investigating input of forms directly into processing software to avoid typing in names and addresses etc. |