

# Customer, Communications and Democratic Services Business Plan

2018/19–2022/23



# Customer, communications and democratic services in numbers

## How many?

- 1,619** information requests
- 146,527** electors in local elections (May 2018)
- 159** formal council meetings
- 65** informal meetings
- 33,072** online forms submitted
- 22,216** My Portsmouth accounts
- £10,545,518** online payments
- 1,222,818** unique website users
- 90,539** calls handled by city helpdesk
- 8,336** customers seen by city helpdesk
- 35,081** payments through cashiers
- 97%** customer satisfaction in city helpdesk
- 19,295** unique email subscribers
- 225,288** marketing emails sent
- 3,803,269** social media reach

*figures are for 2017/18 unless specified*

## Making money

- £4.3m** income from traded services
- £3.5m** income from Emirates Spinnaker Tower deal
- £657,049** internal and external income from marketing, comms, design and digital

## Saving money

- £2.5m** digital transformation savings by 2019/20
- 25%** budget reduction in city helpdesk since 2014/15
- £1,352,313** saved per annum on print and advertising since 2012

# Profile of services

The focus of the business plan for the next five years is on the delivery of projects with corporate significance and the continuous improvement of services with a view to increasing financial sustainability. However, our ability to move forwards and drive change is underpinned by the outstanding work that is done by dedicated staff in maintaining a reputation for excellence across our business as usual. Our directorate profile demonstrates the scale and scope.

## Local democracy

**Stewart Agland**

### **Elections and electoral registration**

Responsibility for administering parliamentary and local elections and referendums, and for compiling/maintaining electoral register.

### **Democratic services**

Responsibility for all aspects of work connected with council meetings and decision making.

### **Corporate governance**

Responsibility for managing requests for information, via Freedom of Information (FOI), Data Protection, Environmental Information Regulations (EIR) and leading on General Data Protection Regulations (GDPR) changes.

### **Stakeholders**

**Public:** residents, those eligible to vote (registered and unregistered), customers making information requests, customers from minority/protected characteristic groups, users of voluntary sector services.

**Political:** all councillors, including the Lord Mayor and Deputy Lord Mayor, election candidates and agents.

**Internal:** staff, managers, directors and chief executive.

**Partners:** voluntary and community sector organisations, schools, electoral commission.

**Clients:** Portsmouth Clinical Commissioning Group (CCG), Fareham Borough Council, HM Coroner's court.

**Suppliers:** Xpress.

## Marketing, communications, digital and customer services

**Charlotte Smith**

### **Marketing and communications**

Responsibility for public relations/media management, internal, external and crisis communications, and marketing and branding for all council services, via a small corporately funded core team, and a wider project/service funded team.

### **Market research**

Responsibility for overseeing all council consultation activity, and providing market research and insight for campaigns/activity.

### **Design**

Self-financing studio, responsible for all the council's design work as well as generating external income.

### **Digital customer experience**

Responsibility for quality standards across digital, and operational and strategic responsibility for website/intranet.

### **Customer services (city helpdesk, cashiers and corporate complaints)**

Responsibility for around 200,000 phone, face-to-face and email customer contacts per annum.

### **Customer transformation**

Responsible for delivering corporate digital customer transformation programme.

### **Stakeholders**

**Public:** residents, businesses, people who work in the city, visitors.

**Political:** all councillors.

**Internal:** all staff, managers, directors, chief executive.

**Clients:** internal services, Gosport Borough Council, Portsmouth CCG, Fareham Borough Council, schools.

**Partners:** Portsmouth CCG, NHS Solent, Portsmouth Hospitals Trust, Hampshire Police, Hampshire Fire & Rescue Service, Hampshire & Isle of Wight Local Resilience Forum, Solent Deal councils.

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# Priorities 2018/19: corporate projects and priorities

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# Local democracy: GDPR

**Responsible manager:** Stewart Agland

**Project lead:** Helen Magri

## Brief summary

The General Data Protection Regulation (GDPR) came into force 25 May 2018 and we need to ensure the council is compliant. The priorities are to communicate changes to staff, update and deliver training, carry out an information asset audit, analyse the results and prioritise any actions to ensure compliance, compile an electronic information asset register, review policies and procedures, ensuring the changes are incorporated into all areas of the business, supporting partners in preparing for the changes, and to communicate changes to the public.

## Objectives

- To ensure the council complies with the GDPR and new Data Protection Act which came into force 25 May 2018
- To avoid monetary penalties for non-compliance
- To deliver against all remaining objectives detailed in the GDPR project plan by 30 December 2018
  - To provide access for all information asset owners and co-ordinators to the electronic information asset register by 30 June 2018 to enable them to keep details of their assets up to date
  - To identify all contracts that do not have GDPR compliant clauses and issue deeds of variation by 30 December 2018
  - To identify all data processors with whom no data processing agreement exists and issue a GDPR compliant agreement to be signed by 30 December 2018
  - To review and update all existing information sharing agreements and introduce new agreements where none currently exist by 30 December 2018

## Key actions required

Now the results of the electronic information asset register have been collated, a further project plan will be drawn up, prioritising the work on a risk basis.

## Timeline for year one

### Q1 and Q2 April to September

Monitor compliance of contractors with the regulation.

### Q3 and Q4 October to March

Ensure the information asset register is updated by information asset owners.

## Issues and risks

- Lack of resource to carry out the work
- Inability to get providers of systems to make changes that allow us to be compliant
- Cost of making system changes

### Mitigating actions

- Inform the GDPR project sponsor of resource issues and use allocated budget to engage necessary staff
- IT service to work with providers of systems to address non-compliant issues and keep records of correspondence as evidence of our attempts
- Expensive changes to systems to be agreed by the project sponsor on a risk-based approach and a record of the decisions to be kept as evidence

## Dependencies

- Resource across all areas of the business

# Marketing, communications, design, digital and customer services: digital customer transformation

**Responsible manager:** Charlotte Smith

## Brief summary

This is a corporate capital programme, which secured £535,000 of capital investment based on projected savings, cost avoidance or income generation. It is the second phase of an already successful first phase of the programme – known as channel shift – which will have delivered £2.5m of cumulative savings by 2019/20. Digital customer transformation is a significant priority for the council in terms of delivering the projected financial benefits.

In terms of benefits to the customer, the programme delivers improvements to customer service by providing the digital channels that phase one of the programme has already shown are in demand. In addition to the programme, digital customer transformation will also be delivered via the digital customer experience team, which will be working towards the replacement of the website. This will save money and improve the customer experience, supporting the above digital customer experience programme aspirations.

## Objectives

- Deliver year one of programme plan
- Achieve year one benefit realisation

## Key actions required

- This is a complex programme, which has a programme plan. Actions required are to deliver the plan for year one, develop a detailed plan for year two and, for digital customer experience, review the existing website, create a web strategy and develop a new website by July 2019.

## Timeline for year one

### Q1 April to June

- Implement Q1 of customer transformation plan
- Start review of existing website

- Develop case for change and secure approval

### Q2 July to September

- Implement Q2 of customer transformation plan
- Develop website replacement plan

### Q3 October to December

- Implement Q3 of customer transformation plan
- Implement website replacement plan

### Q4 January to March

- Implement Q4 of customer transformation plan
- Put detailed plan together for year two of customer transformation programme
- Continue to implement website replacement plan

## Issues and risks

- Projects taking longer than anticipated: mitigated by ensuring sufficient contingency in the plan, and by careful monitoring of projects and programme plans to ensure action taken to address any slippage
- Lack of buy-in for programme: mitigated by ensuring directors/third tier/members informed and engaged with good internal communications
- Loss of key staff from small delivery team: mitigate by ensuring knowledge is shared between team members and development supported by documentation
- Lack of resources to deliver in-house build of website: mitigate through business case and income generation to put sufficient resources in place

## Dependencies

- Digital transformation is dependent on the services who require digital channels, to provide the resources necessary to develop and test solutions.



# Marketing, communications, design, digital and customer services: customer service

**Responsible managers:** Charlotte Smith

## Brief summary

Customer service is a corporate priority. This priority area will look at the development of a customer service strategy designed to improve our overall approach to customer service.

## Objectives

- Research, develop and implement new customer service strategy
- Establish baseline measures and monitor performance - including customer satisfaction measure

## Key actions required

- Review current approaches, develop new strategy, including improved approach to and learning from customer feedback, develop training, utilise city helpdesk as exemplars, develop new approach to corporate complaints

## Timeline for year one

### Q1 April to June

- research customer service accreditation
- plan research for overall strategy

### Q2 July to September

- implement research and analysis
- define scope and content of strategy, and consult

### Q3 October to December

- finalise strategy and create implementation plan

### Q4 January to March

- implement strategy

## Issues and risks

- lack of buy-in: use priority for Cabinet member to mitigate and secure engagement
- lack of resources to deliver this work: mitigate by allocating specific resources

## Dependencies

- Buy-in from all customer-facing areas of the council

# Marketing, communications, design, digital and customer services: development of brand and corporate narratives

**Responsible manager:** Charlotte Smith

## Brief summary

This corporate priority is focused on the development of refreshed corporate narratives and brand identity, designed to support council priorities. This work will be based on a stakeholder mapping exercise, followed by research around current stakeholder perceptions.

## Objectives

- Develop new corporate priorities/narratives/plan on a page/brand values
- Communicate through the organisation – measure through employee opinion survey in June 2019

## Key actions required

- Stakeholder mapping exercise
- Focus groups and in-depth interview research with key stakeholders around perceptions
- Development of new brand values and corporate narratives

## Timeline for year one

### Q1 April to June

- Complete stakeholder mapping and communicate internally

### Q2 July to September

- Market research with key stakeholders

### Q3 October to December

- Development of new brand values and corporate narratives

## Issues and risks

- Lack of buy-in: mitigated by ongoing communication to explain purpose of work

## Dependencies

- Input from other directorates

# Marketing, communications, design, digital and customer services: engagement and community development strategy

**Responsible managers:** Charlotte Smith

## Brief summary

This priority focuses on improving our corporate approach to engagement with our local communities and their involvement in the design of services, through improvements to consultation activity and approaches, and through the development of a strategy designed to enhance community networks and increase resilience and involvement. Improving consultation activity and approaches will include reviewing consultation sign-off processes and visibility of consultations; increasing communications around consultations via web, social media and email marketing; reviewing and developing the citizens panel; and introducing monthly engagement events.

In 2018/19, the community development strategy will be researched and created, with implementation from 2019/20 onwards.

The engagement and involvement of our communities will include the extension of the HIVE Portsmouth project, supporting the development of the personalisation agenda and delivering in partnership the outcomes of place-based social action.

## Objectives

- Develop and implement consultation sign-off process
- Develop consultation events – target of three events per quarter
- Review and relaunch citizens panel – target of 1,200 members
- Increase number of resident engagements per annum – establish baseline in 2018/19 and measure from 2019/20
- Develop and implement the HIVE Portsmouth programme

## Key actions required

- Review consultation sign-off, big list and consultation communications, create strategy and implement changes
- Develop and implement consultation events
- Review citizens panel, relaunch and implement
- Research community engagement and develop strategy
- Develop and implement community events with partners and other directorates
- Develop and implement digital platforms for sharing Portsmouth stories.

## Timeline for year one

### Q1 April to June

- Review consultation sign-off process, big list and consultation communications
- Develop consultation events programme
- Review citizens panel
- Implementation plan for the sitting service, new service to be delivered to new cohort in June
- Infrastructure support in-house, developing requirements for procurement
- Development of strategy for HIVE Portsmouth
- Confirm location
- Development of access and information interactive map

### Q2 July to September

- Create consultation strategy
- Re-launch citizens panel
- Implement consultation events

### **Q3 October to December**

- Monitor impact of changes to the consultation approach and review
- Research community engagement and develop strategy

### **Q4 January to March**

- Monitor impact of consultation approaches changes, review
- Continue to research community engagement and develop strategy

## **Issues and risks**

- Lack of buy-in from directorates: mitigate through ongoing internal stakeholder engagement
- Lack of engagement with consultation approaches: mitigate through effective marketing and ease of use

## **Dependencies**

- Input from other directorates
- Support from marketing and city helpdesk in promoting and delivering consultations

# Priorities 2018/19: service priorities

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# Overall: valuing staff

**Responsible managers: all**

## Brief summary

Our staff are our most important asset. This priority focuses on staff development and future service resilience. It also reflects the directorate response to the annual employee opinion survey (EOS). A training needs assessment (TNA) is already underway in response to the last EOS, where staff told us opportunities for training and development could be improved. This will be completed in 2018/19, directorate training needs prioritised and training implemented. Further projects will be added in response to the summer EOS. Attendance will continue to be closely monitored, and measures put in place to address related issues.

## Objectives

- TNA completed, prioritised and training implemented in accordance with plan
- Improved EOS results in key target areas TBC
- Continued attendance improvements

## Key actions required

- Complete TNA, prioritise and implement
- Review absence and agree collective and individual team actions – monitor progress

## Timeline for year one

### Q1 April to June

- TNA: review completed analysis, cost, training required, prioritisation exercise with DMT
- Absence: review position as a DMT and agree actions

### Q2 July to September

- TNA: implement
- Absence: implement and monitor
- EOS: review and respond to latest results, develop new EOS plan

### Q3 October to December

- Implementation and monitoring across all areas

### Q4 January to March

- Implementation and monitoring across all areas

## Issues and risks

- There is a risk around capacity to deliver this work: mitigated by prioritising valuing staff
- There is a risk around training budgets: mitigated by prioritising and allocating resources accordingly

# Local democracy: elections software retender

**Responsible manager:** Stewart Agland

## Brief summary

Retender exercise for electoral management software. There is a waiver in place which extends the current contract until the end of the calendar year. This is a priority as the system is critical to the operation of the service. The project is already in progress and will require support from Procurement and IT.

## Objective

- Review, procure if appropriate, and implement any changed software by the end of Q4 2018/19, subject to flexibility in the event of snap elections.

## Key actions required

- Review procurement/contract options available, complete procurement, award and implement new system

## Timeline for year one

### Q1 April to June

- Review procurement/contract options available

### Q2 July to September

- Undertake procurement

### Q3 October to December

- Award new contract

### Q4 January to March

- Implement new system

## Issues and risks

- If the contract is awarded to a new supplier there would be potential issues with data migration and training. This would be a particular risk if there was a snap election during any migration/go-live period: mitigated by having a flexible project timetable, or by allowing for a further waiver period

# Marketing, communications, design, digital and customer services: income generation

**Responsible manager:** Charlotte Smith

## Brief summary

The priority is to increase income generated from marketing, communications, design, digital and customer services. The service is already supported by internal and external income, which supplements the cost of the core marketing and communications function, and the digital customer experience team, and provides 100% of funding for graphic design. The objective is to increase external income, to reduce the impact of budget savings and make the marketing and communications function cost-neutral for the council. An agency approach has been established, with a business plan, brand – PortCreative – logo, trademark and website.

## Objectives

- Increase income in line with targets
- Develop and implement new advertising approach for Flagship

## Key actions required

- Flagship advertising – establish new approach and implement, create new advertising policy, commence email advertising, review web advertising
- PortCreative – plan resource availability, create and deliver marketing strategy, create packages for design, digital, marketing, PR/comms, sell packages

## Timeline for year one

### Q1 April to June

- Secure new ad sales approach for Flagship or put together proposal to reduce costs – implement
- Email marketing advertising trial underway
- Implement Port marketing, communications and digital – recruit new post and transfer websites

### Q2 July to September

- Develop and implement new ad policy
- Finalise email advertising approach and implement
- Investigate website advertising as part of overall web strategy and business case
- Launch PortCreative website and develop PortCreative schools PR/comms packages and promote

### Q3 October to December

- Implement web advertising IF appropriate (TBC in line with digital strategy)
- Implement PortCreative marketing strategy, undertake target number of sales and marketing activities

### Q4 January to March

- Maintain ad sales at required level
- Continue to implement PortCreative marketing strategy and make sales



## Issues and risks

Risk of insufficient resources to market services and to deliver work sold: mitigated through resource planning and recruitment of permanent/temporary staff as required.

## Dependencies

The digital customer experience team is involved in generating income and delivering digital improvements in support of the digital strategy and customer transformation. This issue will be mitigated with careful resource management and recruitment of additional staff to support income generation.

# Future years: year two: 2019/20

## Corporate priorities

### **Local democracy: GDPR**

- Ensure the information asset register is updated, monitor compliance, monitor completion of training, review information sharing agreements, privacy notices, Data Protection Privacy Impact Assessments and consent forms

### **Marketing, communications, digital and customer service: digital customer transformation**

- Digital customer transformation is funded for 2019/20 and 2020/21
- Key actions – implement year two customer transformation plan, prepare year three plan, go live of website, go live of intranet, ongoing web development, SOCITM 4 star rating

### **Marketing, communications, digital and customer service: customer service**

- Implement year two of customer service strategy

### **Marketing, communications, design, digital and customer service: engagement and community development strategy**

- Monitor, review and maintain ongoing development of consultation improvements

## Service priorities

### **Overall: valuing staff**

- In year two, the TNA analysis will be revisited to review the current training and development needs and additional training implemented as required. Monitoring of sickness absence and measures to address will continue to be a priority, with a focus on ensuring staff support and wellbeing. Continue to respond to its EOS results

### **Local democracy: statutory review of polling districts and polling places**

- Review of polling places and polling districts to be undertaken from June 2019 and to seek council approval prior to implementation from December 2019

### **Marketing, communications, digital and customer services: income generation**

- Maintain existing clients through delivery of excellent services and client management, identify new big clients and on-board, identify new advertising opportunities and sell advertising at required levels, sell ad hoc design, digital, marketing, comms and research at required levels

### **Marketing, communications, digital and customer services: print and advertising review**

- A review is planned for 2019/20 (Panacea contract expires July 2019). Moving toward a more comprehensive marketing, design and print management solution to generate efficiency savings in procurement, stock management, invoicing, and reduce management charges through increased self-serve.

## Significant issues/events

- Local elections – May 2019

# Future years: year three: 2020/21

## Corporate priorities

### **Marketing, communications, digital and customer services: customer service strategy**

- Continuous review and ongoing development of customer service improvements

### **Marketing, communications, digital and customer services: digital customer transformation**

- Implement year three plan, ongoing development of web functionality, maintain 4-star website

### **Marketing, communications, design, digital and customer service and local democracy and voluntary sector development: engagement and community development strategy**

- Monitor, review and maintain ongoing development of consultation improvements

## Service priorities

### **Overall: valuing staff**

- TNA analysis will be revisited annually to review the current training and development needs and additional training implemented as required. Monitoring of sickness absence and measures to address will continue to be a priority, with a focus on ensuring staff support and wellbeing. Continue to respond to its EOS results

### **Marketing, communications, digital and customer services: income generation**

- Income generation: maintain existing clients through delivery of excellent services and excellent client management, identify new big clients and on-board, identify new advertising opportunities and sell advertising at required levels, sell ad hoc design, digital, marketing, comms and research at required levels.

## Significant issues/events

- Local council and Police and Crime Commissioner elections – May 2020

# Future years: year four: 2021/22

## Corporate priorities

### **Marketing, communications, digital and customer services: customer service strategy**

- Review and refresh strategy

### **Marketing, communications, design, digital and customer service: engagement and community development strategy**

- Monitor, review and maintain ongoing development of consultation improvements

## Service priorities

### **Overall: valuing staff**

- TNA analysis will be revisited annually to review the current training and development needs and additional training implemented as required. Monitoring of sickness absence and measures to address will continue to be a priority, with a focus on ensuring staff support and wellbeing. Continue to respond to its EOS results

### **Marketing, communications, design, digital and customer services: income generation**

Income generation: maintain existing clients through delivery of excellent services and excellent client management, identify new big clients and on-board, identify new advertising opportunities and sell advertising at required levels, sell ad hoc design, digital, marketing, comms and research at required levels

# Future years: year five: 2022/23

## Corporate priorities

### **Marketing, communications, digital and customer services: customer service**

- Implement strategy

### **Marketing, communications, design, digital and customer service: engagement and community development strategy**

- Monitor, review and maintain ongoing development of consultation improvements

## Service priorities

### **Overall: valuing staff**

- TNA analysis will be revisited annually to review the current training and development needs and additional training implemented as required. Monitoring of sickness absence and measures to address will continue to be a priority, with a focus on ensuring staff support and wellbeing. Continue to respond to its EOS results

### **Marketing, communications, digital and customer service: income generation**

Income generation: maintain existing clients through delivery of excellent services and excellent client management, identify new big clients and on-board, identify new advertising opportunities and sell advertising at required levels, sell ad hoc design, digital, marketing, comms and research at required levels

## Significant issues/events

- Local and general election – May 2022







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