

CORPORATE AND COMMUNITIES OVERVIEW AND SCRUTINY PANEL 11 MARCH 2021

MEMBER CASE MANAGEMENT SYSTEM

Summary

1. The Cabinet Member with Responsibility for Transformation and Commissioning (CMR) and the Assistant Director for Information Technology and Digital have been invited to the meeting to update the Panel on the Member Case Management System (Members Portal) development.

Background

2. Currently, there is not a consistent system in place to manage Member queries to Service Area managers. Members make an enquiry by emailing a known contact in a Service Area and do not have oversight of how a query is progressing and in several cases no reply has been received to the query.
3. Therefore, a new Member Query Case Management System is being developed that will provide Members with:
 - An on-line form to log an enquiry regarding a Service Area detailing the name and contact information for the member, details of the enquiry and the facility to upload any supporting documents as required
 - An on-line Dashboard to view all their submitted enquiries, review the status of queries, responses to queries, check reply deadlines and request updates on queries
 - Member enquiry co-ordinators will be able to:
 - View all new Member Queries, the details of the query and the documents uploaded with the query.
 - Assign the query to the appropriate lead officer and additional officers across the organisation as required.
 - Contact and co-ordinate responses to a query from relevant managers and Council officers.
 - Monitor and manage response times for each query effectively to make sure they are responded to within the required time limit.
4. The Member Query Case Management system will be developed on the Council's low code platform Outsystems at no additional cost. Outsystems was the preferred technology option as it will enable Officers to rapidly develop the system and seamlessly integrate with other systems, for example, School Transport, Customer Services and Highways reporting. Ultimately providing a single front door for members to manage their enquiries.
5. Meetings have been scheduled with business leads to define processing times and Service Level agreements. Once they have been collectively agreed they will be automated within the new system.

6. Appendix A shows Mock-ups to illustrate the look, feel and functionality of the proposed Member Case Management System

Progress

Date	Activity
December 2020	Member Portal Survey sent to all Councillors
December 2020	Democratic Governance and Scrutiny Manager onboarded as Business Owner for the project.
December 2020	Information Access Coordinator (IAC) / Corporate Information Governance Group (CIGG) Report developed.
13 January 2021	Member Portal Workshop held with Member Support Team, to go through the team's requirements for the Member Portal
03 February 2021	Requirements gathering meeting with business stakeholders, identified by the Member Support Team.
February 2021	Further meetings with other identified business stakeholders to be set up, during February 2021, when their availability permits, currently unavailable as dealing with emergencies in the County.
05 February 2021	Survey returns have been analysed and themes identified.
05 February 2021	Initial system design mock-ups drafted
08 February 2021	Member Portal – Member Workshop to Feedback to Members on the insights and information derived from the Survey. Review of the initial system design mock-ups for the Member Portal enquiry system for further feedback and comments before system development begins
16 February 2021	Discussion held with member support team and other potential co-ordinators.

Timeline for implementation

Date	Activity
25 February 2021	Phase 1 - Development kick off meeting.
1 March 2021	Sprint 1 - Build commencement to include member enquiry form, member dashboard to view and manage enquiries. Officer dashboard for enquiry administration.
22/23 March 2021	Sprint 1 - Formal demonstrations take place with key stakeholders.
24 March 2021	Sprint 2 - Complete build of portal with member enquiry form, member dashboard to view and manage enquiries. Officer dashboard for enquiry administration. Including feedback.
12/13 April 2021	Sprint 2 - Formal demonstrations take place with key stakeholders
14 April 2021	Sprint 3 – Final build to include sprint 2 feedback
26 April 2021	Phase 1 go-live

7. Going forward, the Panel should note that:

- The forthcoming County Council elections may impact on the availability of Members to engage with the demonstrations and the go-live date at the end of April.
- Following the implementation of Phase 1, a post implementation review will be undertaken, and requirements gathered for further development of the Members Portal.

Purpose of the Meeting

8. Following discussion of the information provided, the Scrutiny Panel is asked to

- a. Consider the Council's progress with the development of the Members Case Management System.
- b. Determine any comments it wishes to make to the Cabinet Member with Responsibility for Transformation and Commissioning.
- c. Agree whether any further Scrutiny is required at this stage.

Supporting Information

- Appendix 1 – Mock-ups to illustrate the look, feel and functionality of the proposed Member Case Management System

Contact Points

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Background Papers

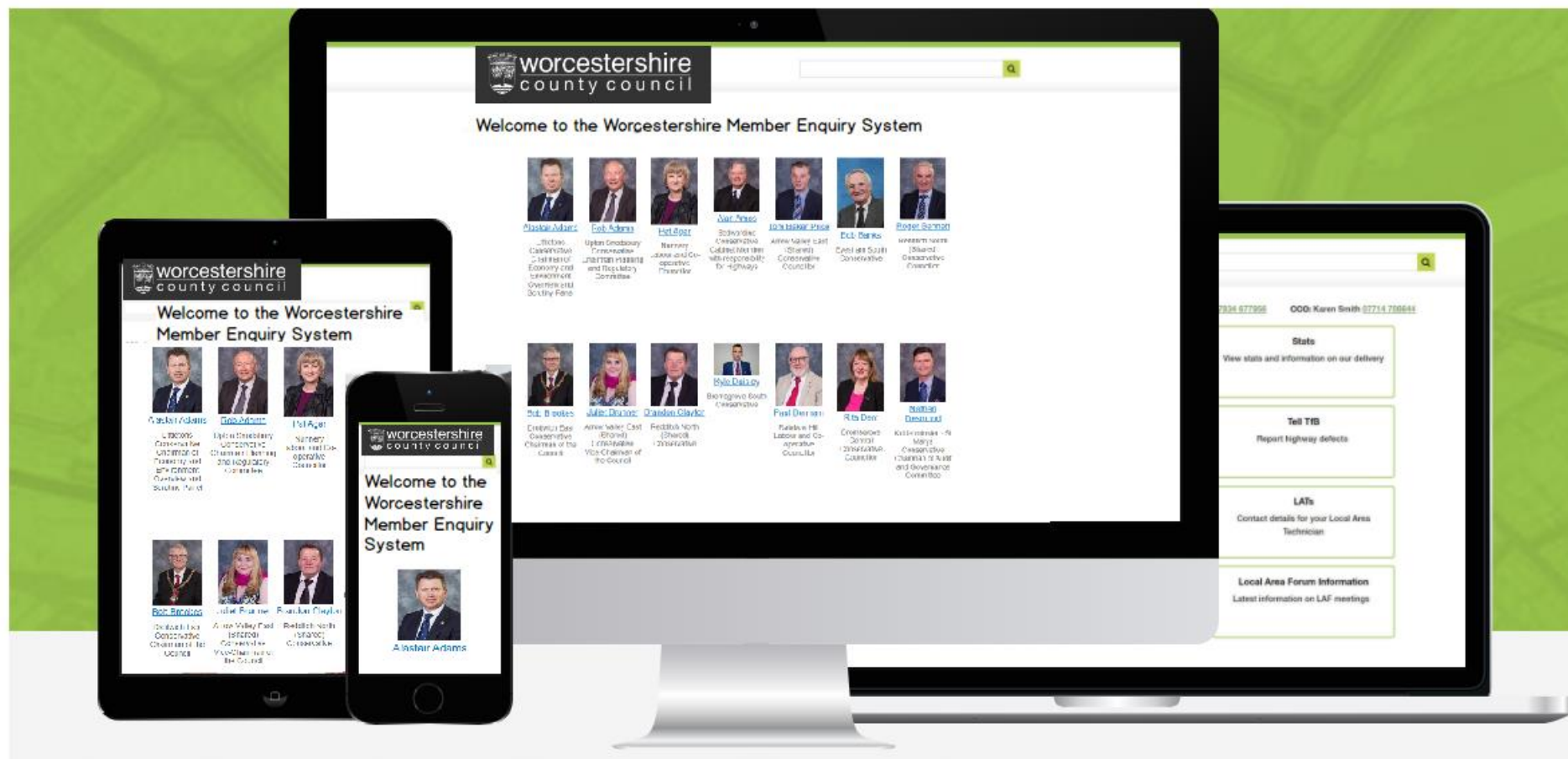
In the opinion of the proper officer (in this case the Assistant Director for Legal and Governance) the following are the background papers relating to the subject matter of this report:

[Corporate and Communities Overview and Scrutiny Panel 17 June 2020, Agenda and Minutes](#)


[All agendas and minutes are available on the Council's website here.](#)

AGENDA ITEM 7

Appendix A: Mock-ups to illustrate the look, feel and functionality of the proposed Member Case Management System.







 Login

Worcestershire County Council

 Login

 Sign in to your account


Email or Username and Password 


Email or Username


Password

☒ Keep me logged in

Login

 Forgotten your password? Reset it here

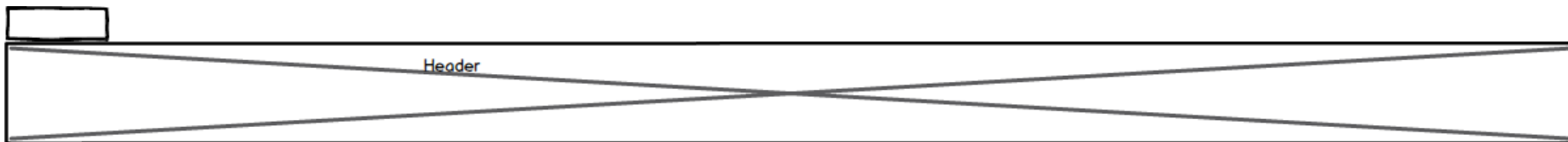
 Sign in to your account

Single Sign-on 

This application supports single sign-on authentication

Click below to authenticate using your system login credentials

Single Sign-on Login



Member Queries Dashboard

Query Type

Case Id #

Service Area

Surname

Directorate

Email

District

Apply Filter

Reset

Export

31

New



2

In Progress

0

Completed

Id	Name	Enquiry Type	Preferred Contact Method	Service Area	Date Time Created	Request Status	Edit Details
840	Mickey Mouse	Complaint	Email mmouse@worcestershire.gov.uk	Highways	09/01/2021 09:56:37	New	Update Status

