

CORPORATE AND COMMUNITIES OVERVIEW AND SCRUTINY PANEL 29 SEPTEMBER 2023

MEMBER PORTAL

Summary

1. The Corporate and Communities Overview and Scrutiny Panel (the Panel) has requested an update on the Member Portal.
2. The Cabinet Member with Responsibility for Corporate Services and Communication and the Strategic Director of Commercial and Change have been invited to attend the meeting.

Background

3. The Member Portal provides elected County Councillors (Members), with a system to manage their enquiries to the County Council (the Council), including:
 - 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 enquiries, responses to enquiries, check response deadlines, request updates or ask questions about enquiries.
 - Officers responsible for coordinating Member enquiries can:
 - View all new Member enquiries relevant to their service area, the details of the enquiry and the documents uploaded with the enquiry.
 - Contact and co-ordinate responses to an enquiry from relevant managers and Council officers.
 - Update Members with progress on an enquiry.
 - Respond to Members questions and updates on an enquiry.
 - Monitor and manage response times for each enquiry effectively to make sure they are responded to within the required SLA.
4. The Member Portal was developed on the Council's low code platform OutSystems. OutSystems was the preferred technology option as it enabled rapid development of the system and will enable the seamless integration with other systems as required, for example Highways reporting.
5. In 2020, the Corporate and Communities Overview and Scrutiny Panel had identified the need for a Member Query Case Management System as there was no system in place to manage Member queries to service areas. At its meeting on 17 June 2020, the Panel was presented with a number of proposals and Members supported the recommended proposal for the Council's Digital

Transformation Team to build a system. The agenda and minutes are available in the Background Papers of this Report. The resulting Member Portal was launched in 2021.

Recent improvements to the Member Portal

- Integration with the Highways Report It system:** The Member Portal is fully integrated with the Highways Report It (HRI) system, and Members can report a safety issue which raises a report direct on the HRI system. Enhanced features include mapping for easy identification of issues relating to street lighting, grit bins, drainage assets, etc, as displayed in Figure 1 below. Enquiries are then updated from the HRI and PEM (public enquiry manager) systems.

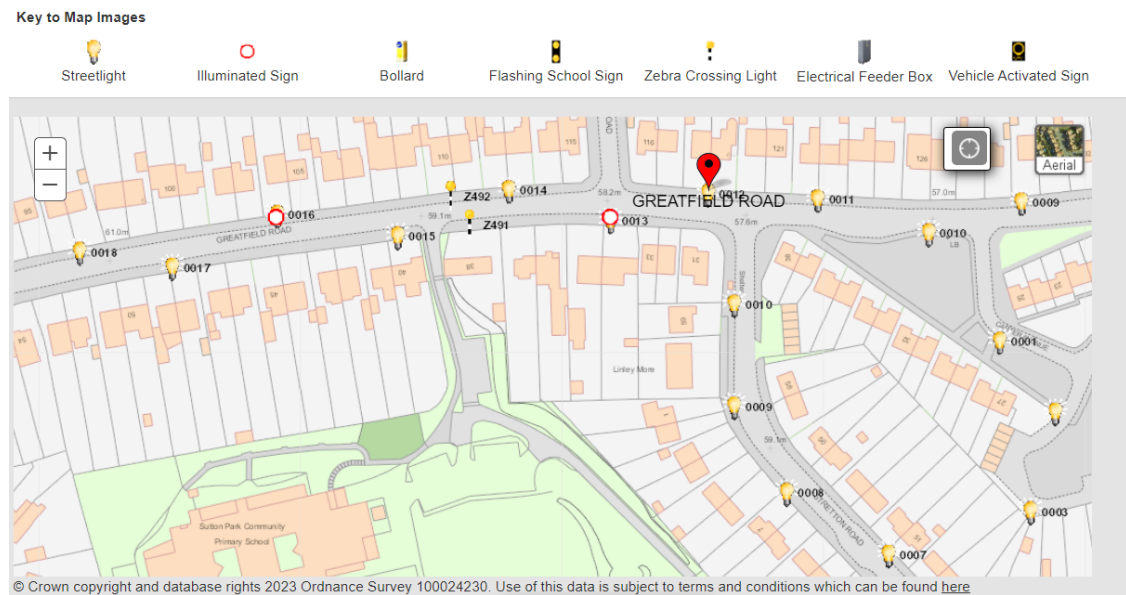


Figure 1: Report-IT interactive map for identifying the location of an issue

- New features for Members:** The Member Homepage has been updated with new visuals and wording to increase ease of use. A pending queue has been added to the system for Members to monitor closed enquiries and to create draft enquiries for submission later. Close enquiry functionality has been added for Members to facilitate the closure of enquiries by Members. An example of a Member's Homepage is displayed below in Figure 2.

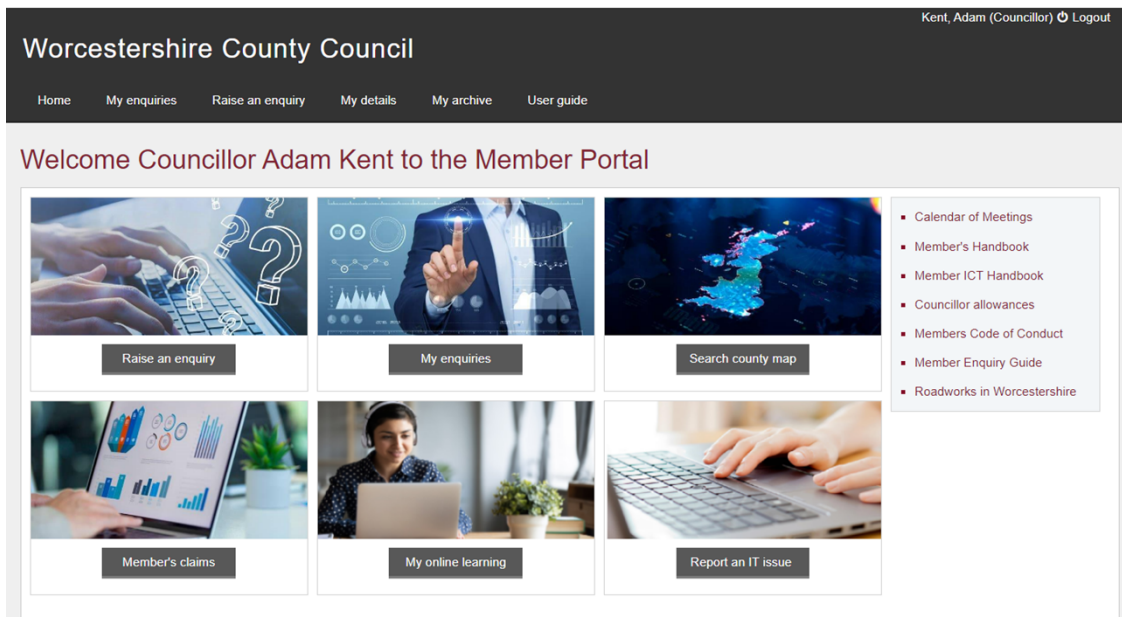


Figure 2: Member Portal homepage

8. **Further Enquiry Types:** Speed Issue Request and Improvement Request have been added as enquiry types in the Member Portal enabling Members to request items including Speed Surveys, Speed Reduction Request, New Vehicle Activated Sign (VAS), Relocation of Vehicle Activated Sign, Carriageway Dressing, Footway Reconstruction and Traffic Regulation Orders.
9. **New feature for Officers:** A fresh look & feel for the question-and-answer Responder Dashboard has been introduced to increase ease of use for Council officers responding to co-ordinator questions. An example of the Responder Dashboard is displayed below in Figure 3.

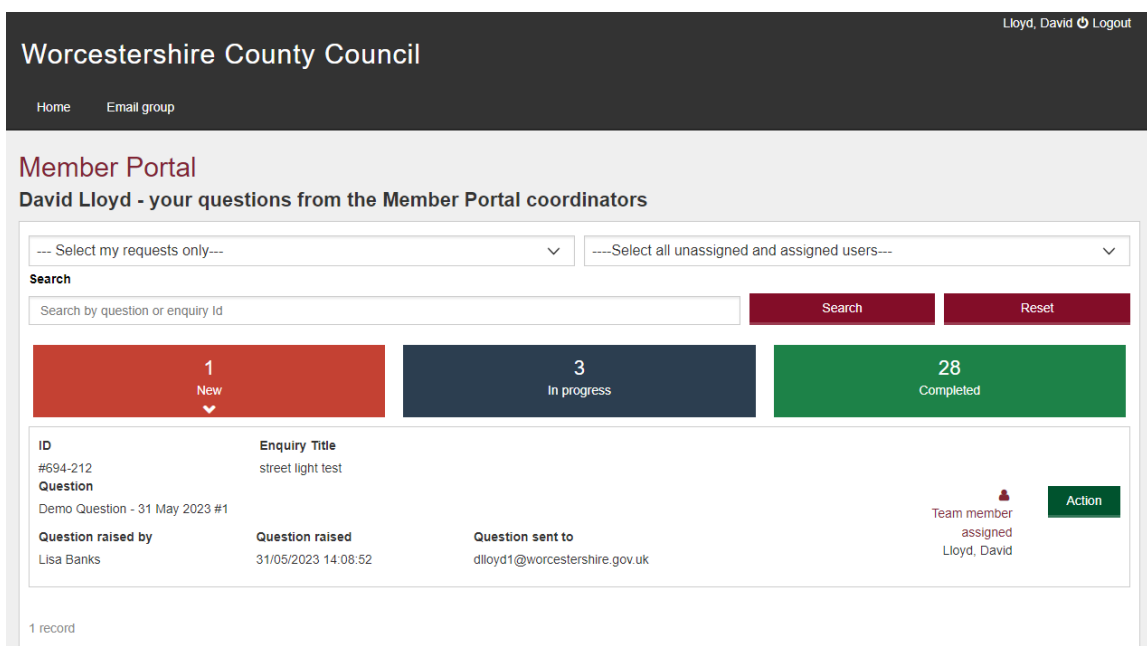


Figure 3: The Responder Dashboard for Officers to answer questions from Co-ordinators about Member enquiries.

10. New features for Member Enquiry Co-ordinators:

- The search and filter functionality on enquiries has been updated and improved, including the addition of a new Works Area assignment and filter for Environment and Infrastructure Directorate (E&I) co-ordinators.
- The ability to update details on an Enquiry has been added.
- A new queue has been developed for E&I co-ordinators to group enquiries that are long term and awaiting work to be carried out.
- An enquiry conversion function has been developed to allow E&I co-ordinators to convert any Enquiry type e.g., Information Request to a Report a Safety Issue request which will then integrate with the HRI system.
- Functionality has also been developed to remove a question to another Officer from a Co-ordinator where it may result in the duplication of activity, with full audit trail.

11. Member Portal Teams Site: A Microsoft Teams Site for the Member Portal has been established for Member and officer (Coordinator) groups promoting information and resources to support the understanding and use of the Member Portal and includes Member Portal User Guides for Members and co-ordinators and User Guide Videos for Members and co-ordinators.

Usage of the system

12. Member enquiries have been made to a range of service areas across the organisation including Adult Social Care, Bikeability, Broadband 5G & Connectivity, Children's Social Care, Countryside Greenspace, Health, Highways, Human Resources & Organisational Development, Libraries & Learning, Pollution, Public Rights of Way, Public Transport, Registration Services, Rural Estates, School Admissions, School & College Travel, Schools, Education & Learning and Transport & Travel. Most enquiries submitted are to the Highways Service Area (96.91%) these enquiries are managed by the County Liaison Officers who are the co-ordinators for all Member enquiries across the E&I Directorate.

13. Analysis of Members Portal from 31 July 2022 to 31 July 2023 has been undertaken.

14. Figure 4 shows the volume of enquiries by district and enquiry type.

Enquiries by District and Enquiry Type

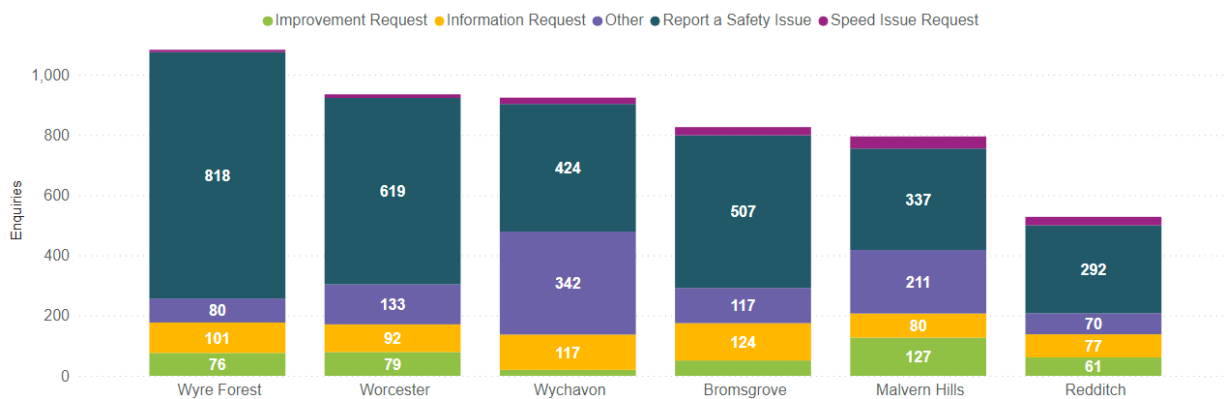


Figure 4: Enquiries by District and Enquiry Type

15. Figure 5 shows the volume of enquiries created by councillors and officers by month:

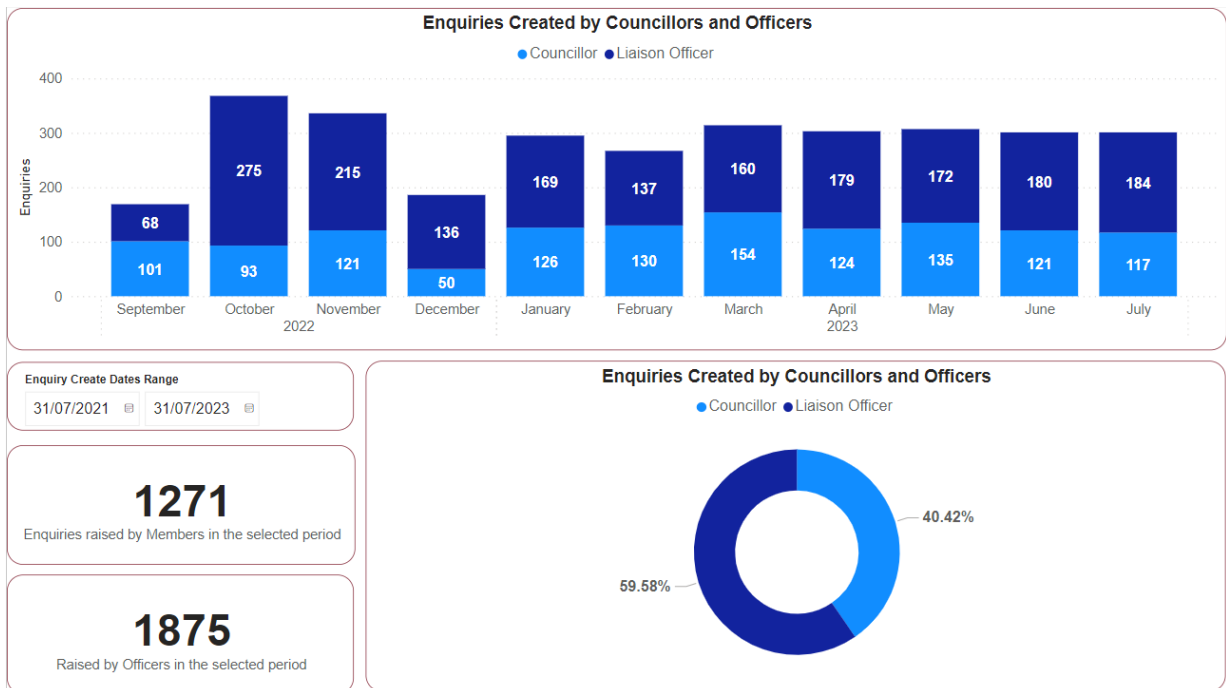


Figure 5: Volume of enquiries by created by councillors and officers by month.

16. All Member enquiries that come through the Highways & Transport Control Centre will be entered onto the system. The Member Portal is being embedded across other teams within the E&I Directorate and feedback will also inform further development opportunities.

17. Figure 6 illustrates the average working days to first response for enquiries raised in each month. Following the improvements to the system and processes, the average working days to first response has improved and is now well within the 10-day Service Level Agreement (SLA).

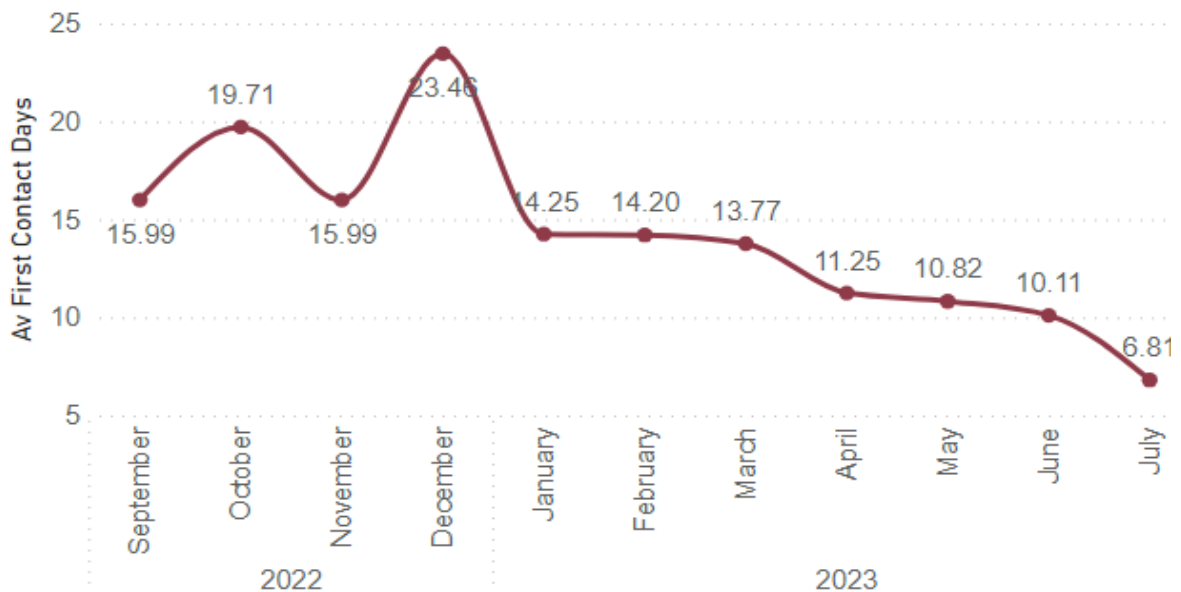


Figure 6: Average working days to first response for enquiries raised in each month.

18. Figure 7 illustrates the Average working days to complete enquiries raised in each month. Following the improvements to the system and processes, the average working days to complete has substantially improved.

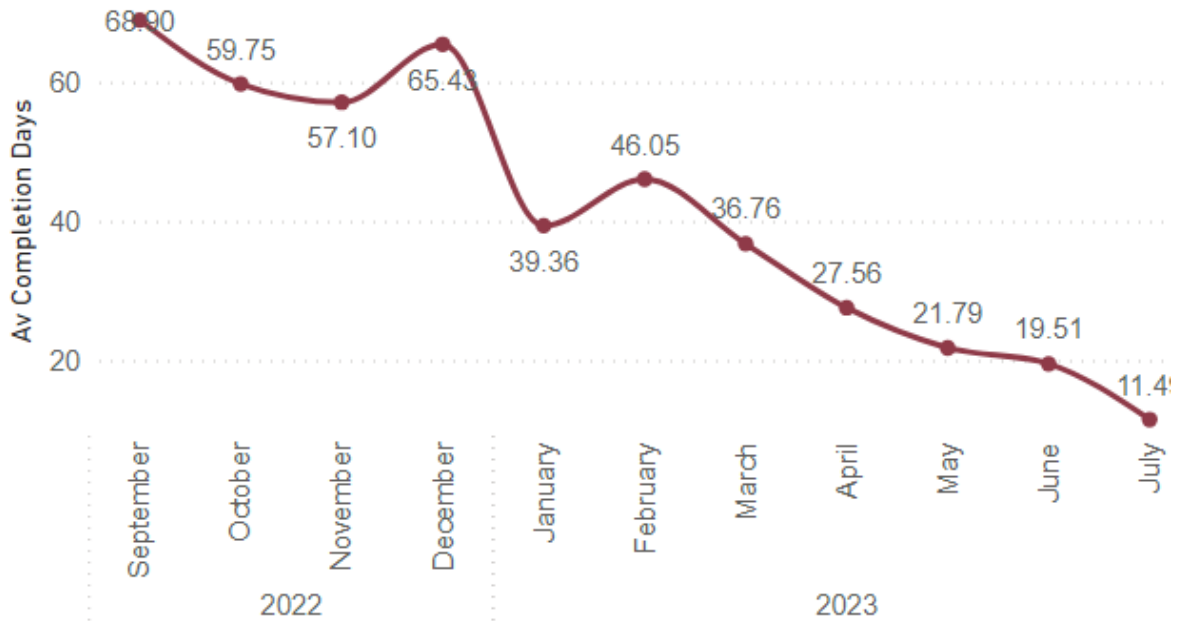


Figure 7: Average working days to complete enquiries raised in each month.

19. Figure 8 shows the analysis of first response time, where there is a 10-working day Service Level Agreement.

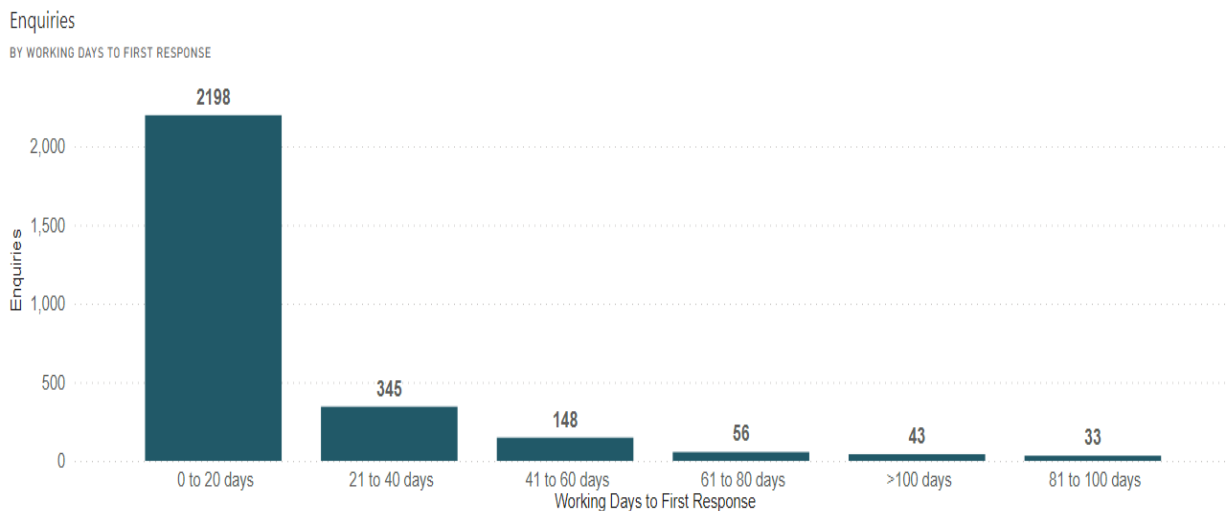


Figure 8: Enquiries by working days to first response.

20. Figure 9 shows the number of enquiries by working days to complete where there is a 28 working day Service Level Agreement. Within that time, officers will have inspected or reviewed the situation to determine the appropriate action. This can sometimes take longer than the 28 days, for example where a third party might be involved or where there is a complex drainage issue. An enquiry is not closed until it has been fully actioned and works (if appropriate) delivered on the ground.

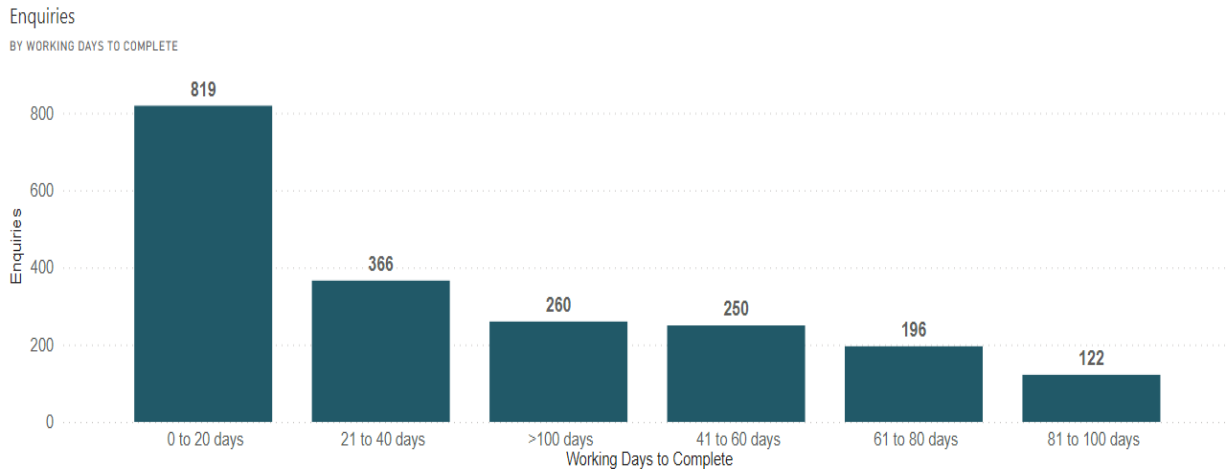


Figure 9: Enquiries by working days to complete.

21. As outlined in Figure 10, in summary, during the period 31/07/2022 to 31/07/2023:

- a. 3146 enquiries were raised on the system.
- b. 96.91% of the enquiries were for Highways.
- c. 58.58% of enquiries were raised by officers on behalf of members.
- d. 60.46% of enquiries have been completed.

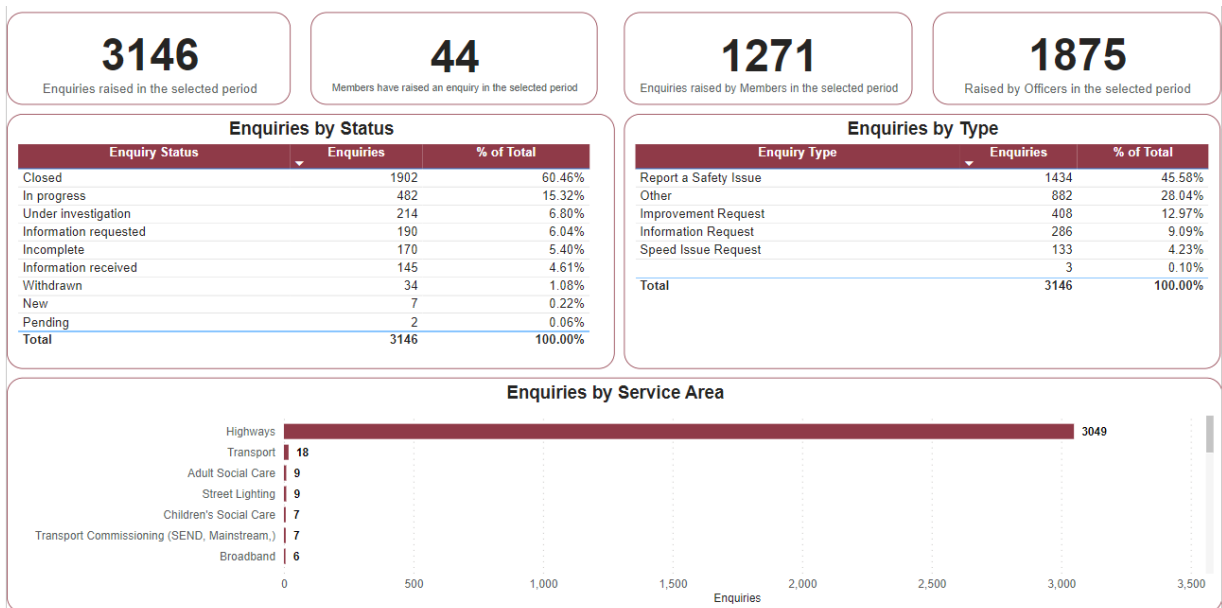


Figure 10: Enquiries by status, type and service area

22. Enquiries/Reports can be reopened by both the Member and officers. These occurrences might occur when Members feel that the information provided is insufficient to enable them to respond to their residents, or in cases where new information has come to light. The total of enquiries re-opened includes any re-opened by an officer to enable them to add information or upload a document, as opposed to it being re-opened at the request of a Member. Figure 11 provides an overview of the re-opened cases dashboard statistics.

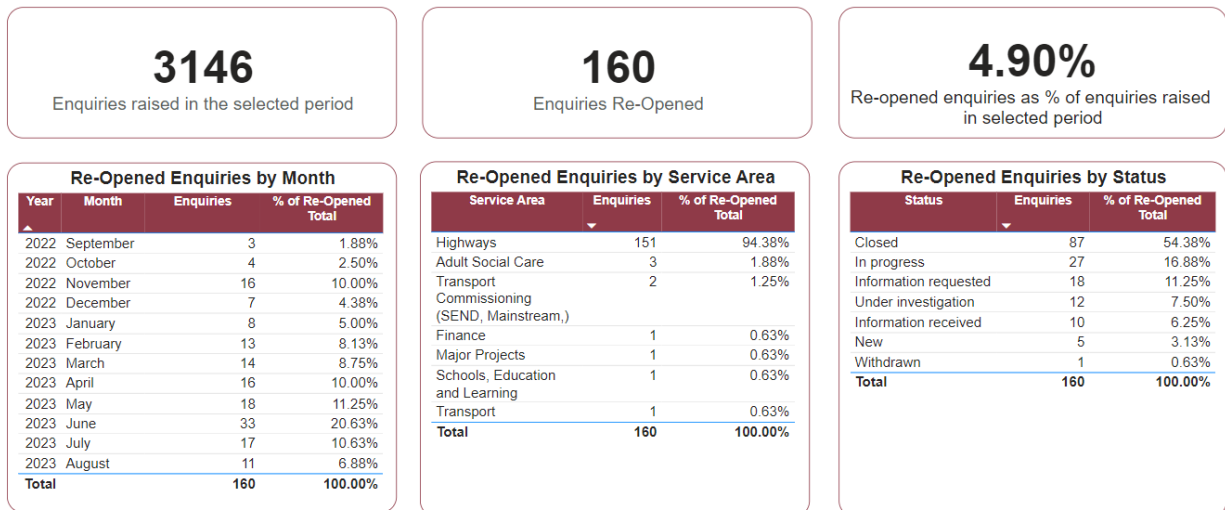


Figure 11: Re-opened cases dashboard

Transformational and Change Activities

23. Between September 2022 and February 2023, working in partnership with colleagues in E&I Directorate and IT & Digital, the Transformation and Change Team delivered a project of activity to:

- encourage increased Member engagement and understanding of the improved Member Portal functionality.
- promote the Member Portal with all Members and specific operational officers, as the preferred single channel for all Member enquiries to be processed through.

24. This included a significant amount of Project and Change Management activity incorporating changes in service working practices, improved management information and reporting, training and ongoing support for officers and Members.

25. The project team worked closely with all stakeholders to ensure development, full visibility and accessibility to all training materials, information advice and guidance. This included presence at Full Council meetings of a Member Portal Clinic, creation of an MS Teams site with bespoke Member and officer channels, comprehensive written aide memoires, process maps, training guides and videos, bespoke political group meeting communications. officer communications, one-to-one sessions with Members on request, and attendance at service team meetings.

26. Feedback was sought from both Members and officers to inform the ongoing project development and management information reporting transition to PowerBI. The involvement of the Transformation and Change Team ceased with the advent of directorate lead project management (see section below on project HEART), from February 2023.

E&I Directorate Improvement Activities Project - HEART

27. Project Heart was established in February 2023 to review the handling of enquiries via the Member Portal. The focus of the project was initially prioritised to E&I, and specifically Highways Operations and Traffic Management.
28. Project HEART recognised that whilst the Member Portal was intuitive to use and provided a good information database, it was not easy to filter the enquiry information. This has been resolved by the implementation of additional filters. The request is now clear and the reason for the enquiry is understood, ensuring the enquiry can be easily directed to the correct service area for faster resolution.
29. A few system issues were identified, which have been resolved. Bespoke training was delivered to staff ahead of the wider roll out. A glossary of service areas, teams and work streams has been produced to ensure correct enquiry allocation.
30. The Member Portal is supported by good management reporting, which focuses on statistics and resolution of enquiries. There is a degree of complexity involved in Member issues and these remain visible on the portal, until closed.

Benefits Achieved

31. The benefits achieved include:
 - Overview for all Members' enquiries increasing transparency of issues raised and actions taken to resolution of enquiry.
 - All enquiries captured in one place providing a full audit trail of activity and progress.
 - Local Members and officers can collate issues in usable format ahead of meetings to inform discussions e.g., Parish Council meetings, site visits etc.
 - Information in the system enables officers to review demand and allocate resources appropriately.
 - All enquiries can be effectively managed using the Member Portal.

Next Steps

32. **Member Portal Enquiry Map for Members and Co-ordinators:** The facility will enable Members and Co-ordinators to visualise their enquiries in a variety of ways including a heat map to see highlighted issues or hotspots of activity by Division, District, Parish.
33. **Feedback survey:** to obtain Member feedback and ensure future developments accord with their requirements.
34. **Phase 3 Development** to include the following:
 - Review options for members to report and receive updates more easily from a mobile device.
 - Additional file management functions for Members and Co-ordinators to provide improved file management facilities, file naming, adding files to Councillor updates and adding files to completed enquiries.

- Integration of the Customer Access Platform within the Member Portal, which will enable Members to log their requests for walking and cycling improvements.

Purpose of the Meeting

35. The Corporate and Communities Overview and Scrutiny Panel is asked to:

- consider the information provided in the report; and
- determine whether any further information or scrutiny is required.

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 background papers relating to the subject matter of this report:

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

All Agendas and Minutes are available on the Council's website [weblink to Agendas and Minutes](#)