

**South Lakeland District Council**  
**Overview and Scrutiny Committee**

**Friday 17<sup>th</sup> July 2020**

**Development of locality working through Customer  
Connect - Overview and Scrutiny Task and  
Finish Group Recommendations.**

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**Portfolio:** Cllr Vicky Hughes – Chairman of the Overview and Scrutiny Committee

**Report from:** Simon Rowley - Director of Customer and Commercial Services

**Wards:** (All Wards);

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**1.0 Expected Outcome**

1.1 Overview and Scrutiny Committee consider the findings and recommendations arising from the work of the Development of locality working through Customer Connect Task and Finish Group and make onward recommendations, as considered appropriate, to Cabinet.

**2.0 Recommendation**

**2.1 It is recommended that Overview and Scrutiny Committee:-**

**(1) Consider the report and recommendations, as detailed in Appendix 1, arising from the work of the Task and Finish Group and determine if these recommendations should be forwarded to Cabinet for further consideration as part of the design of the locality working arrangements.**

**3.0 Background and Proposals**

3.1 The council has embarked on an innovative whole scale transformation programme of how it arranges its resource's and delivers its services, with the focus being on the customer. The programme is called Customer Connect and can be summarised as follows;

'South Lakeland District Council is transforming service delivery. By improving its systems and providing more self-service options for residents, business and visitors, SLDC will reduce processes to free up staff to assist our most vulnerable communities and driving prosperity for all. The Council's new operating model is modelled around customer needs and outcomes. This new approach and culture will combine competencies, knowledge and capability of staff in a slicker more joined up way which will provide more efficient, sustainable and cost effective delivery of services in the future.'

3.2 As part of this transformation the existing staffing structures have been realigned into new job families including Specialist officers, Case Management officers, Customer Service officers and Locality officers.

- 3.3 It is our intention to move decision making closer to the customer, resolving customer requests as soon and as straightforwardly as possible. A fundamental concept is 'Case Management' through which a member of staff will take responsibility for managing a service request from beginning to end, drawing in the necessary information, knowledge and expertise to provide an answer and resolution for the customer.

We wish to achieve the same outcomes by working 'on the patch' in communities, working closely with Ward Councillors, resolving local neighbourhood issues, doing what needs to be done face to face and enabling local communities to address their aspirations for improving their locality.

This is now known as **locality working**. It will take a new approach from our staff, being more flexible, with a confidence to address a wider range of issues, supported by their training, by access to information and advice within the organisation, by working in an agile way. It will also take a fresh approach from our Ward Councillors, with better access to the knowledge and resources of the Council, through our locality staff and through their access to information we hold about localities.

It is intended that locality working will have three main capabilities:

- Capability to Inspect, gather information, undertake neighbourhood enforcement

- Capability to build relationships between the Council's services, Ward Councillors and local communities

- Capability to enable community led projects

And have the broad customer groupings:

- The Public – residents – businesses – visitors – and external organisations, including Parish and Town Councils

- The Ward Councillor

- Officer colleagues – which seek services from Locality Services

- 3.4 As part of the 2019/2020 Overview and Scrutiny work program the creation of locality working was considered to be one area that members wished to explore in more detail on the design of the proposal and how locality working may in practice work with Customers , elected members, partners organisations and other stakeholders .

- 3.5 A task and finish group was established and held an initial scoping meeting on the 7<sup>th</sup> March 2019. The key considerations arising for the task and finish group to consider in subsequent meetings were;

It was agreed that 4 meetings would be convened to consider;

- A meeting with some key local stakeholders – CCC, National Park Authorities, CALC (Cumbria Association of Local Councils) and Housing Associations. A presentation being provided of the proposals and the benefits to communities, residents and businesses, and gauge the organisation's view of locality working and how they might be able to/wish to get involved.

- To discuss measures of success – what benchmarking has taken place, what benchmarking and monitoring activity needs to take place, what will success look like and how will it be measured.

- Member's role in locality working – how Members will be able to operate in a locality working environment, what support and development might Members need to allow them to do this. It was also agreed that engagement with the MSSG regarding future

member development and how Members will engage with locality working would be required.

A final meeting to consider all the matters arising and action points together and discuss report to O&S Committee.

- 3.6 Subsequent meetings of the task and finish group and performance measurement sub group were held on the 10<sup>th</sup> October 2019, 14<sup>th</sup> November 2019, 22<sup>nd</sup> January 2020 and 31<sup>st</sup> January 2020 to consider those matter detailed above in 3.4.
- 3.7 The meeting held with local stakeholders on the 31<sup>st</sup> January 2020 provided an opportunity for those present, including representatives from Cumbria County Council (CCC), CALC and Cumbria Constabulary Neighbourhood Policing Team, to hear about the proposed locality working arrangements and provide a view about how they could positively contribute to the work of the locality teams.
- 3.8 The key actions and recommendation's arising from the work of the task and finish group are summarised in Appendix 1 and were due to be presented to Overview and Scrutiny Committee on the 17<sup>th</sup> April 2020 , however due to the Covid-19 Pandemic the meeting was cancelled and is presented now to the committee for consideration.

#### **4.0 Consultation**

- 4.1 Engagement with key stakeholders/partners has been undertaken as part of the work of the task and finish group work as detailed in 3.7 above. Whilst other partner organisations were invited to attend the meeting held on the 31<sup>st</sup> January 2020, only CCC, CALC and the Police attended. Details of the Customer Connect programme and how we will arrange and deliver services in future has been communicated to all Parish and Town Councils and District Council Elected Members, as well as other key stakeholders including both national parks.

#### **5.0 Alternative Options**

- 5.1 The Report and Appendix summarise the activities of the Development of locality working through Customer Connect Task and Finish Group.

#### **6.0 Links to Council Priorities**

- 6.1 The work of the Overview and Scrutiny Committee will contribute towards us meeting our Council priorities. Through Customer Connect we are transforming the way we deliver services to our customers. This work will contribute towards shaping how we aim to inspire and empower our communities to thrive.

#### **7.0 Implications**

##### **Financial, Resources and Procurement**

- 7.1 There are no direct financial implications leading from this report.

##### **Human Resources**

- 7.2 There are no direct Human Resource issues arising from this report.

##### **Legal**

- 7.3 There are no legal implication arising from this report.

##### **Health, Social, Economic and Environmental**

- 7.4 Have you completed a Health, Social, Economic and Environmental Impact Assessment? No

7.5 If you have not completed an Impact Assessment, please explain your reasons: Not applicable.

7.6 Summary of health, social, economic and environmental impacts: Not applicable.

### Equality and Diversity

7.7 Have you completed an Equality Impact Analysis? No

7.8 If you have not completed an Impact Assessment, please explain your reasons: Not applicable.

7.9 Summary of equality and diversity impacts: Not applicable.

### Risk

Risk	Consequence	Controls required
Not Applicable		

### Contact Officers

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### Appendices Attached to this Report

Appendix No.	Name of Appendix
1	Recommendations arising from the Developing Locality Working through Customer Connect Task and Finish Group 2019/2020

### Background Documents Available

Name of Background document	Where it is available
Locality Working Presentation for Partners	<a href="http://sharepoint.southlakeland.gov.uk/sites/committeeservices/scrutiny/Task%20and%20Finish%20Groups/Development%20of%20Locality%20Working%20through%20Customer%20Connect%20Task%20and%20Finish%20Group/10-10-20%20Locality%20Working%20-%20Members%20Roadshow.pptx">http://sharepoint.southlakeland.gov.uk/sites/committeeservices/scrutiny/Task%20and%20Finish%20Groups/Development%20of%20Locality%20Working%20through%20Customer%20Connect%20Task%20and%20Finish%20Group/10-10-20%20Locality%20Working%20-%20Members%20Roadshow.pptx</a>
Locality Working Briefing Note for Partners	<a href="http://sharepoint.southlakeland.gov.uk/sites/committeeservices/scrutiny/Task%20and%20Finish%20Groups/Development%20of%20Locality%20Working%20through%20Customer%20Connect%20Task%20and%20Finish%20Group/31-01-20%20Locality%20Working%20brief%20resume%20-%20stakeholders.doc">http://sharepoint.southlakeland.gov.uk/sites/committeeservices/scrutiny/Task%20and%20Finish%20Groups/Development%20of%20Locality%20Working%20through%20Customer%20Connect%20Task%20and%20Finish%20Group/31-01-20%20Locality%20Working%20brief%20resume%20-%20stakeholders.doc</a>
Locality Working Briefing Note for Councillors	<a href="http://sharepoint.southlakeland.gov.uk/sites/committeeservices/scrutiny/Task%20and%20Finish%20Groups/Development%20of%20Locality%20Working%20through%20Customer%20Connect%20Task%20and%20Finish%20Group/10-10-19%20Locality%20Working%20brief%20resume.docx">http://sharepoint.southlakeland.gov.uk/sites/committeeservices/scrutiny/Task%20and%20Finish%20Groups/Development%20of%20Locality%20Working%20through%20Customer%20Connect%20Task%20and%20Finish%20Group/10-10-19%20Locality%20Working%20brief%20resume.docx</a>

## Tracking Information

<b>Signed off by</b>	<b>Date sent</b>
Legal Services	01/07/2020
Section 151 Officer	
Monitoring Officer	01/07/2020
CMT	N/A

<b>Circulated to</b>	<b>Date sent</b>
Lead Specialist	N/A
Human Resources Lead Specialist	29/06/20
Communications Team	N/A
Leader	29/06/20
Committee Chairman	29/06/20
Portfolio Holder	29/06/20
Ward Councillor(s)	N/A
Committee	N/A
Executive (Cabinet)	
Council	