



Capita Staff Briefings

Welcome and Introduction

Mark Wyllie – Capita Partnership Director

Agenda for Today

- **Welcome and Introductions**
- **The TUPE process and Capita PeopleCare programme**
- **Service Stream Overviews and Outcomes**
- **Opportunity for Questions and Answers**

Capita StaffCare Programme

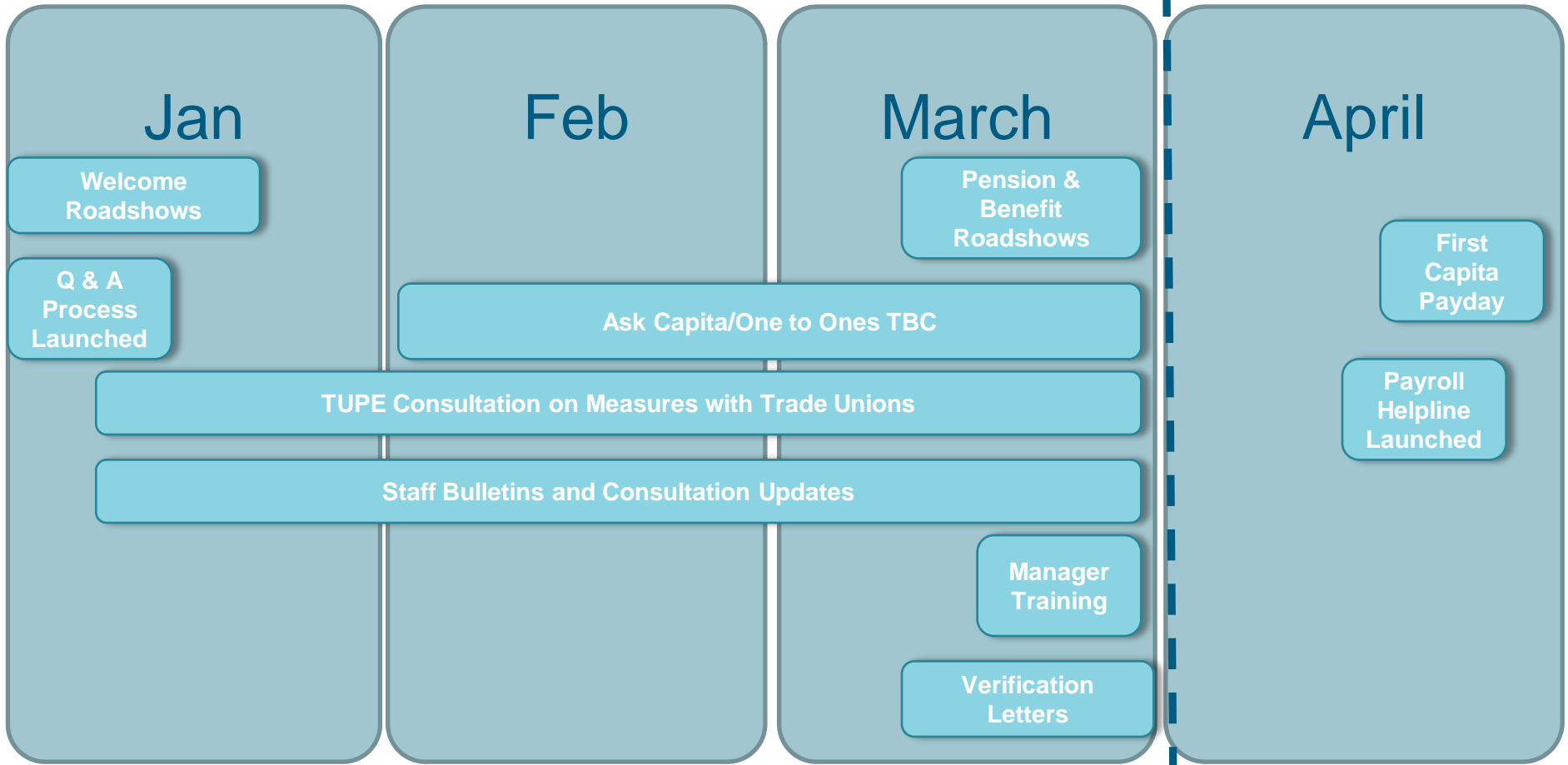
- Staff “Roadshow” briefings
- Regular communication
- Consultation with Trade Unions
- HR support
- Benefits briefings
- Welcome pack with verification letter
- Induction programme
- Managers’ Guide & Capita system workshops

For Consultation

- **No change to contractual Barnet terms and conditions for the first 12 months**
- **Regular weekly consultation meetings with LBB, Capita and the Trade Unions to continue up until the transfer and then regular union dialogue to continue**
- **Proposed that on transfer staff will be paid on the 27th of each month or the preceding working day where this is a weekend or Bank Holiday and circa 20th for December**

Timeline of Events

1st April 2013 Staff Transfer to Capita



Question and Answer Process

- You will be able to raise questions in confidence on areas such as TUPE, the consultation, or anything that you want to know more about
- An individual answer will be issued, and frequently asked questions will be placed in a bulletin that will be issued to all of you regularly.
- Questions can be raised through your employee representative.
- Feedback from consultation meetings will be via your rep or our update bulletins.
- Questions can be raised to a dedicated email address

One to Ones / Ask Capita

- Gives you an opportunity to meet us and to discuss any HR queries that you may have about the transfer - small group or 1-1
- 1-1 can have your employee rep a Capita Ops person and Capita HR rep. This will be held to discuss how the immediate transfer affects you and also how short-medium term plans affect you and what support is in place.
- You can still raise questions through the Q&A email address



Continued support and Information

- Before transfer you will all receive a welcome pack containing useful information about joining Capita
- Regular information will be coming out to you through the staff bulletins and FAQs
- We will issue you with a payroll guide, including an example of a Capita payslip
- Our Integration team will be on site throughout transition to provide opportunities to ask us anything or just catch up with workstream leads
- On your first Capita pay day we will be running a payroll helpline, for you to raise any queries

Business Area Slide



What will happen specifically in the Business Area including timing of moves

CAPITA



Customer Services

Solution Overview – Customer Services

Key Aspects of the Solution

- **Customer Service Professionals delivering:**
 - External calls (3 teams - People, Street & Property) to be delivered from the new Contact Centre location
 - Adult Social Care Direct – remains in Barnet
 - Face to Face delivered locally through most appropriate locations and targeted at those residents most in need of one to one support
- **Improved web access requiring a re-design and creation of transactional and information content, signposting, and effective integration**
- **Delivering a multi-channel Customer Access Strategy** highlighting which customer groups require which services and by which channel, using Customer Insight - Needs & Preferences which supports identification of underlying need and informs a “life events” approach to service delivery
- **Enabling customers to self-help – portals and “Amazon Style” online account**
- **Customer Advocacy across the Ecosystem** – using suppliers contracted to LBB, central government orgs, community groups to deliver services. Signposting.
- **Single customer and property view** on new CRM system

Key Outcomes

- Co-design services with customers for customers
- Improved end to end customer experience, and satisfaction, matching customer need to services and channels
- Volume reduction & demand management (through understanding points of failure & avoidable contact)
- Channel Shift and Customers enabled to self-help (also signposting)
- Consistent and efficient processes
- Increased resolution at first point of contact
- Customer Services as the advocate for the customer
- Proactive and preventative interactions

Solution Overview - Contact Centre

Key Aspects of Our Solution

- First six months following Service Commencement Date operation will remain in Barnet with service migration to new site from month 7 onwards
- Blackburn with Darwen Contact Centre site – duplication of existing services from Barnet (following completion of Council CSO Transformation) with ongoing transformation thereafter
- Handles Inbound, Outbound, Email, Social Media and Customer Services Post
- Development of multi skilled Customer Service Professionals
 - Handling 3 tiers of customer service requests
 - Services grouped under People, Street and Property
- Increased first call resolution, process improvement, operational efficiencies, channel shift
- Operations Transition Team engage on site with Barnet colleagues and Dual running period of two months between 2 sites during service migration
- Best practice tools and techniques introduced to operation

Key Outcomes

- Stabilised operation and smooth transition allowing completion of in flight improvement activities
- Leverage significant contact centre capability
- Supports multi channel integrated service
- Improved levels of customer experience and increased first call resolution. Improved agent experience and engagement
- Achieve Channel shift commitments, cost reduction and improved VFM for the council
- Successful transfer of knowledge and local community insight to protect citizen experience
- Enhanced service performance through people experience, performance management and customer satisfaction programme

Solution Overview – Self-service

Key Aspects of Our Solution

- For internal and external customers (including suppliers)
- Improved web capability – transactional, knowledge, resolution, in particular for high volume services, providing intelligent, transactional forms, reducing the need for inbound telephone contact.
- Variety of self-service media, including Natural Language, touch-tone telephony, Internet, mobile, social media
- Extensive development of the Councils website and ongoing web development team in place to ensure that the web responds to changing needs and meets customer requirements
- Personalised and trackable customer information for people to access any time of day through their portal and customer account
- Contextual and searchable knowledge bases

Key Outcomes

- Channel Shift
- Volume reduction
- Increased customer satisfaction
- Opening up access to services
- Increased resolution at first point of contact
- Demand management for back office

Solution Overview – Face to face

Key Aspects of Our Solution

- Refocus face to face provision to be for those elements of a process which require face-to-face intervention i.e. provision of proofs & for those customer groups whom are unable to access other channels.
- To bring together other public sector bodies to provide a full range of services based upon Insight data:
 - **For the Public** - Council services which require F2F interaction (these could be activities which start through initial contact by phone/self-service , such as Housing Benefit application/claim).
 - **For Internal** - Where Council staff can't access IT support anywhere else. Use of office space for meetings. A 'landing point' for internal activities such as HR and Finance if staff are not office based.
 - **For Services** - Delivery of services such as Adult and Children Services, Libraries and business partners for complex cases
 - **For Partners** - Co-location around a 'theme', for example, CAB, Police, Barnet Homes, depending upon demographic data and for elements of the Ecosystem partnerships.
- Appointment system and demand management
- A 'presence' across the Wards – Hubs (links to Property stream)

Key Outcomes

- Refocus resource on those most in need of face to face support
- Demand management and channel shift
- Joining up service provision – One Barnet
- Flexible property solutions for the changing needs of face to face

Customer Service Time scales and overview

Proposed support location						
Location outside Barnet - Blackburn with Darwen						
	Service Commencement Date (SCD)	Adjustments at SCD	End of Transition period		End of Transformation period	Partnership Completion 31/03/2023
Date	01/04/13	01/04/13	19/12/13	31/03/14	31/03/15	Barnet FTEs
FTE in Barnet	83.84	81.80	19.60	19.20	18.50	18.50
FTE outside Barnet		2.00	61.90	59.20	54.25	52.25
Key Activities					Start Date	
Staff Consultation Period					07/01/13	
Staff Bulletins and Consultation Updates					07/01/13	
Due diligence					07/01/13	
Ask Capita/One to Ones TBC					01/03/13	
Pension & Benefit Roadshows					10/03/13	
Verification Letters					15/03/13	
Manager training					02/04/13	
Capita Service commencement Date					01/04/13	
Payroll helpline launches					15/04/13	
First Capita payday					26/04/13	
Transition to Blackburn					01/10/13	

Customer Services - Transformation & Operational Resources

Transition Team (first 5 months)

Tracy Osman
Transition Manager

Project Manager
TBC

DD support

Operational support including
identification of quick wins,
skills and role matching and recruitment

Transformation (first 12 months)

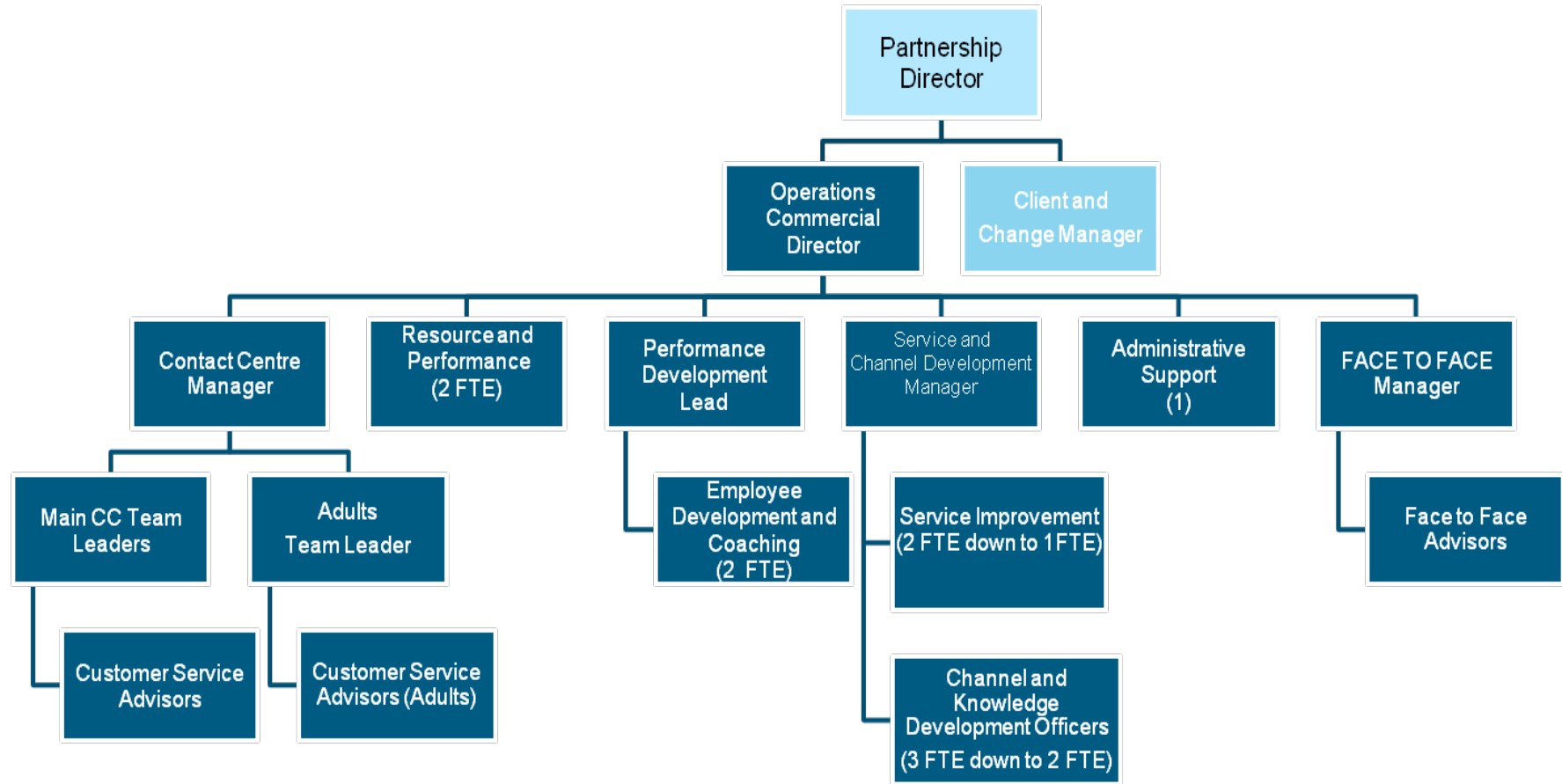
Service Development
Team

Channel Development
Team

Performance
Development Team

IT support to
Implement
infrastructure

CS Structure



CS Customer Journey



Andy and Laura's Situation

Andy is MD of his own building business and has lived in Barnet all his life. Laura works a few hours a week in local shop, fitted in round time with children, but is beginning to have more time on her hands. Andy employs 10 people directly and sub-contracts trades to local small businesses. He has developed expertise in pre-fabricated sustainable office solutions and has seen growth, but the recession is starting to bite. He also can't find youngsters willing to be apprentices.

Experience

While on the Council's website setting up his Council Tax Direct debit, Andy uses the on-line forms to ask about procurement opportunities. He also complains about potholes outside his yard that are causing damage to his lorries.

He receives an phone call the next day from a Customer Services Advisor offering an appointment at a local Neighbourhub with a Business Advisor.

At the appointment, Andy is given information about being a supplier to the Council, areas of demand for his services and about taking on an apprentice via Barnet College.

Having considered all the information, Andy applies on-line to become a Council supplier. He also calls Barnet College about taking on a potential apprentice.

While at a local Community Event at the Colindale regeneration Centre with the children, Laura notices a poster about volunteering.

She uses the bar code reader App on her smartphone to access the website link via the QR code on the poster and is excited by the range of opportunities available locally.

Andy gets a call from his Local Councillor, who's seen Andy's complaint through his dashboard, apologising and advising him when the potholes will be repaired.

Andy gets an e-mail confirming that he's eligible for the Council's e-supplier list and inviting him to a start up seminar.

After some consideration, Laura decides which group she'd like to volunteer for and calls them.



Moments of Truth

- ▶ Access to services by chosen method
- ▶ Support for local businesses
- ▶ Once contact, multiple issues
- ▶ Early intervention

Key Enablers

- ▶ Multi-channel access
- ▶ Customer advocacy
- ▶ Partner/Procurement Integration
- ▶ Member dashboard

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Revenues and Benefits

Revs and Bens Solution

Key Aspects of the Solution

- **£-for£ guarantee for overall CTax collection**
- **LA Error/Admin Delay guaranteed below lower DWP threshold (subject to £5m cap)**
- **Core back office delivered from Blackburn**
 - Economies of scale through delivery of back office processing and shared teams
 - Resilience from Capita infrastructure ,
 - Ability to provide overflow services and backlog services if required
- **Specialist Teams located in Bromley**
 - Final team locations s to be agreed through Due diligence and based on clearer view of functions, skills and individuals
- **Subject matter experts activity delivered from shared service centre**
- **Transformation Programme year 1**
 - Step up in Channel shift towards self service – e-claims/e-billing/e-notifications
 - Process automation
- Retain Civica OpenRevenues systems for duration of current contract
- **Face to face customer enquires will remain in Barnet as part of Customer Service as well as visiting officers, community advocates etc**
- **Insight Engine and channel shift**
 - Ongoing promotion of e-claims and self-service
 - Proactive intervention for hard-to-reach groups
 - E-billing and e-notifications

Key Outcomes

- Co-design services with customers
- Economies of scale
- Increased collection
- Improved processing times
- Reduced printing and postage costs
- Service resilience
- Early and proactive intervention
 - Community based services
 - Tailored access and reduced contacts

Revs and Bens Time scales and overview

Proposed support location						
Location Outside Barnet - Blackburn with Darwen and Bromley						
	Service Commencement Date (SCD)	Adjustments at SCD	End of Transition period		End of Transformation period	Partnership Completion 31/03/2023
Date	01/04/13	01/04/13	19/12/13	31/03/14	31/03/15	Barnet FTEs
FTE in Barnet	126.53	126.53	3.00	3.00	2.00	2.00
FTE outside Barnet	0.00	0.00	109.06	109.06	103.56	88.56
Key Activities					Start Date	
Staff Consultation Period					07/01/13	
Staff Bulletins and Consultation Updates					07/01/13	
Due diligence					07/01/13	
Ask Capita/One to Ones TBC					01/03/13	
Pension & Benefit Roadshows					10/03/13	
Verification Letters					15/03/13	
Manager training					02/04/13	
Capita Service commencement Date					01/04/13	
Payroll helpline launches					15/04/13	
First Capita payday					26/04/13	
Transition to Blackburn					01/08/13	
Transition to Bromley					01/08/13	

R&B - Transformation & Operational Resources

Transition Team (first 5 months)

John de la Rue
Transition Manager

Project Manager
Andrew Taylor

Transition Manager
Andrew Woodward

Interim Head of Service
Pete Magee

DD & Ops Support
APT, CST & SMEs

Transformation (first 12 months)

Training
APT

LGS SSC
and SMEs

LGS Transformation
Programme

CAPITA



Finance

Finance Solution Overview

Key Aspects of Our Solution (Service Specific)

- **Blended service delivery**
 - Face to face business partners in Barnet
 - Back office processing services delivered off-site
 - Technical subject matter experts and Business Partners stay in Barnet
- **Implementation of Integra and Axiom systems to replace SAP**
- **Delivery of cash collection services by National secure collection provider**
- **Promote self service**
 - Online purchasing and requisitioning
 - Business planning and forecasting
 - Electronic invoicing
 - Supplier portal
- **First line contacts not resolved through self help passed to exchequer SMEs in finance**

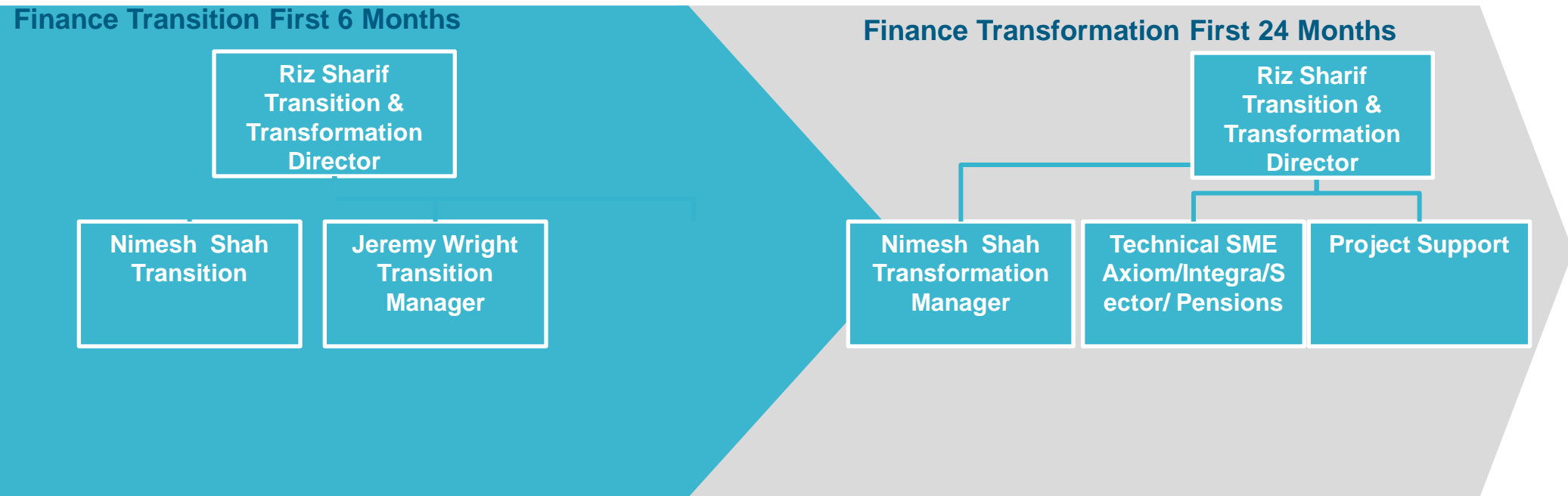
Key Aspects of Our Solution (Service Specific)

- Co-design services with customers
- Implementation of Axiom(Budgeting, Planning and Consolidation) reporting and planning solution or similar
- Pensions service delivered by Hartshead Sheffield
- Treasury service delivered by Sector
- Retained team training to improve process efficiency (Workflow processes and Axiom MI)
- Increased sundry debt collection - Gainshare
- Expansion as a traded finance service for schools – offering Integra as an alternate to RM Finance. Will allow for greater automation and reduced costs

Finance Time scales and overview


Proposed support location						
Locations outside Barnet: Swindon ,Sheffield						
	Service Commencement Date (SCD)	Adjustments at SCD	End of Transition period		End of Transformation period	Partnership Completion 31/03/2023
Date	01/04/13	01/04/13	19/12/13	31/03/14	31/03/16	Barnet FTEs
FTE in Barnet	89.27	90.53	79.72	79.72	70.55	41.57
FTE outside Barnet	0.00	0.00	0.00	0.00	6.68	5.40
Key Activities					Start Date	
Staff Consultation Period					07/01/13	
Staff Bulletins and Consultation Updates					07/01/13	
Due diligence					07/01/13	
Ask Capita/One to Ones TBC					01/03/13	
Pension & Benefit Roadshows					10/03/13	
Verification Letters					15/03/13	
Manager training					02/04/13	
Capita Service commencement Date					01/04/13	
Payroll helpline launches					15/04/13	
First Capita payday					26/04/13	
Transition to Swindon					01/05/14	

Finance Transition & Operational Resources




Finance – Customer Journey


Norman
Budget Management




Services Access




Org. Position



Capability



Case Expertise

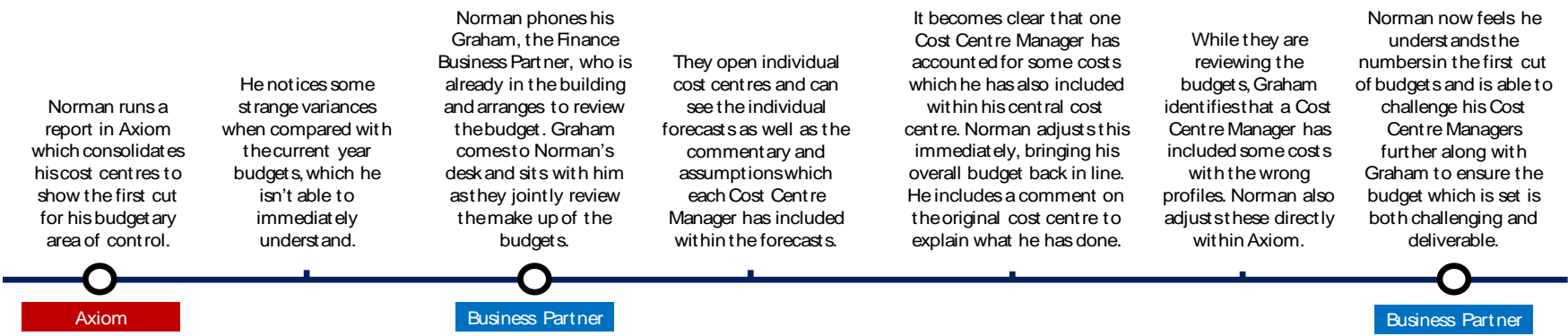


Experience

Norman's Situation

Norman is a Budget Manager in Children's Services, with responsibility for a number of cost centres. He knows his managers have updated their first draft budgets and he wants to review them. Having been involved in the planning and implementation for the new finance system, he understands how the Axiom system works.

Experience



Moments of Truth

- ▶ Easy access to required data
- ▶ Accessible support from Business Partner
- ▶ Simplicity of making changes

Key Enablers

- ▶ Axiom software
- ▶ Business Partner
- ▶ Visible, usable data
- ▶ Immediate change

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IS Service

IT Solution Overview

Key Aspects of Our Solution (Service Specific)

- **Early Intervention (Transition – Month 6)**
 - Connectivity into Capita
 - Interim DR for Critical Applications
 - Enhanced service expertise to supplement management team
 - Service aligned to ITILv3 and underpinned by SLA
- **Transform & Optimise (Years 1 - 3)**
 - Service Desk Moves into Customer Services
 - IT Service moves out of Barnet (Centralised) - service desk and data centre relocated to Chippenham and Chertsey
 - Dynamic Hosting & Cloud (IaaS) replaces Barnet DC
 - Resilient solution includes built-in DR
 - Google Apps piloted and evaluated as an alternative to Office
 - New Thin Client Solution Deployed & Support for BYOD
 - Refresh LAN & Metropolitan Area Network
 - Application Support optimised and consolidated
 - BPO IT Platform Available to Support Service Transformation
 - Schools service strengthened and new services & portal provided
- **Service Revolution (Years 4 – 6)**
 - 90% of Services delivered from the Cloud
 - Majority of IT Services are on a Utility Model and Personalised to the User (Choose your own App)
 - SLAs revised to reflect new shape of service
- **Adapting to the Future (Years 7 – 10)**
 - An ongoing Commercial flexible model based on utility model

Key Outcomes

- Co-design services with customers
- Immediate Service Improvement
- Certainty of Cost in the Early Years
- Adapting to the Changing Shape of the Authority
- Service matches the ambition of the Council for Change and Innovation
- Built in Flexibility to Adapt to Uncertain future requirements
- A Zero Infrastructure Service (Goal)
- Move away from traditional corporate IT to 'Commissioning IT'
- Service Performance Targets hit consistently through good management, not by luck
- Financial Savings
- Proactive supplier and contract management continually drives best value
- Enhanced Transformation Capability to drive affordable change throughout the Authority

IS Time scales and overview

Proposed support location						
Locations Outside Barnet - Chippenham, Chertsey						
	Service Commencement Date (SCD)	Adjustments at SCD	End of Transition period		End of Transformation period	Partnership Completion 31/03/2023
Date	01/04/13	01/04/13	19/12/13	31/03/14	31/03/15	Barnet FTEs
FTE in Barnet	55.30	59.10	31.59	28.59	25.25	13.14
FTE outside Barnet	0.00	0.00	6.00	9.00	9.00	9.00
Key Activities					Start Date	
Staff Consultation Period					07/01/13	
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Due diligence					07/01/13	
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Pension & Benefit Roadshows					10/03/13	
Verification Letters					15/03/13	
Manager training					02/04/13	
Capita Service commencement Date					01/04/13	
Payroll helpline launches					15/04/13	
First Capita payday					26/04/13	
Transition to Chippenham					01/05/14	

IS - Transformation & Operational Resources

Transition Team (first 5 months)

Barry Henderson
Transition Manager

Amy Church
Project Manager

Service Delivery Mgr
Kieran Cook

Transformation (first 12 months)

Goy Roper
Head of IS

PMO Support
Katherine Saubolle

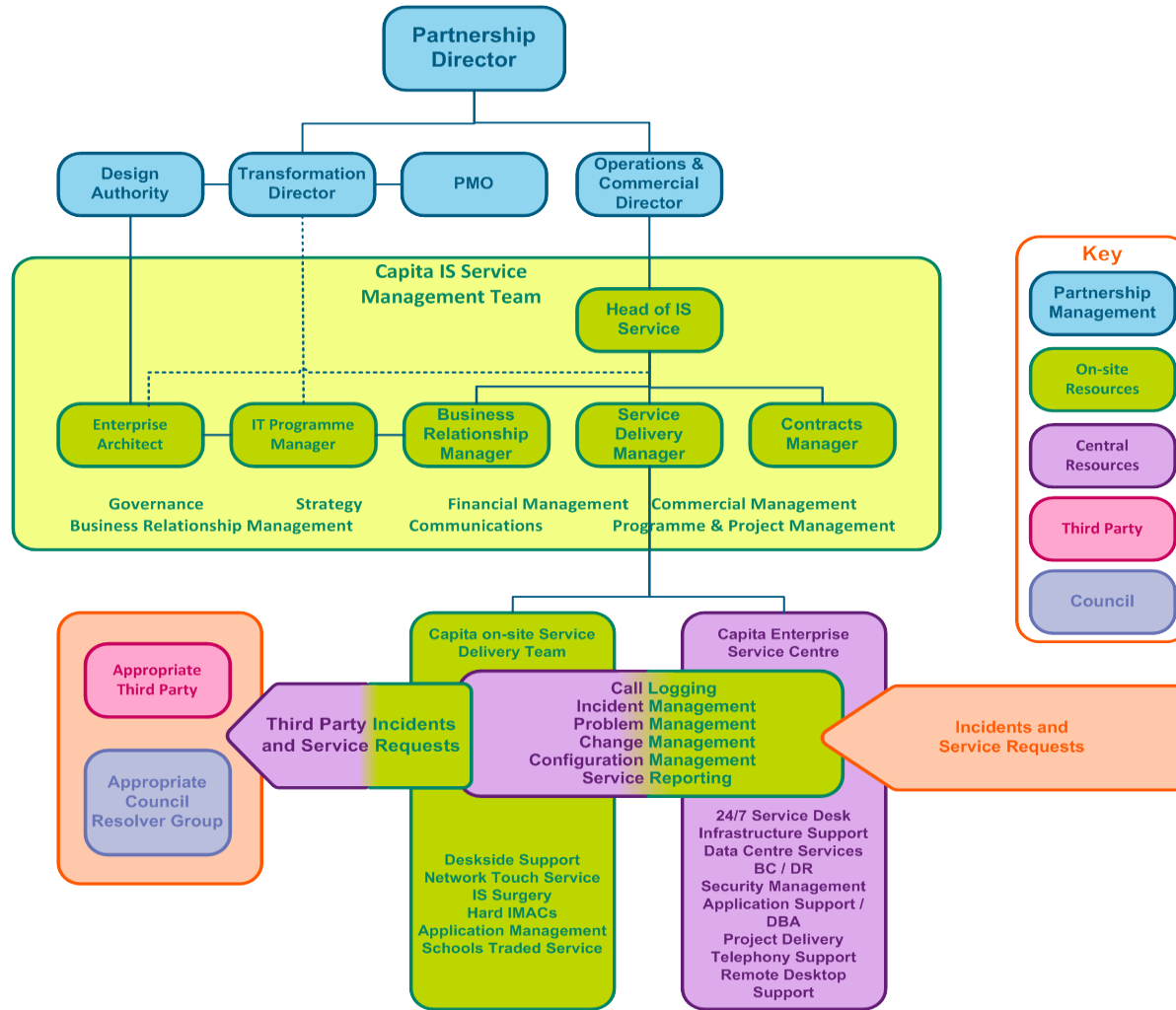
Contracts
Manager

John Julier
Transformation Mgr

Enterprise Architect
Giles Dawson

Business Relationship
Manager

IS Structure



IS customer Journey



Jennifer

IS - Co-design and Self Service



Jennifer's Situation

Jennifer is a manager in Adult Social Care in Barnet. She has been sceptical about proposed changes to services before Capita took them over, particularly around co-design and the use of self service.

Experience

Jennifer sees a marked change in service delivery emphasis with the introduction of Capita's IS Services. On the occasions she's had to call the help desk, the Advisor has really understood her problems and been very responsive in making sure she gets the problems resolved quickly.

Jennifer is amazed to receive an invitation to be involved in co-design workshops to design the front end to the Employee Portal Capita plans to implement for Barnet.

Jennifer attends co-design sessions to develop the Employee Portal. She is impressed with the way the Capita IS staff handle the workshops and the inclusive approach taken. She feels she has been listened to and her views taken into account.

Jennifer remains unsure about the value of self service, but on hearing that the Employee Portal is available, she decides to try making an enquiry about her pension.

She logs in to the Employee Portal using her own ID and Password, which gives her access to her personal information and settings. She finds it easy to navigate and clear to understand and she can find what she needs very easily. She recognises many of the ideas surfaced during the co-design process!

The knowledge management search is easy to use and the resulting descriptions are clear and unambiguous. She's also impressed with the new wide range of services available, which offer her real choice. She makes a mental note to try out the self service recording of IS calls next time she has a problem instead of calling the help desk.

Help Desk

Co-design

Co-design

Employee Portal

Moments of Truth

- ▶ Inclusivity through co-design
- ▶ Self service ease of use
- ▶ Reduced help desk contacts

Key Enablers

- ▶ Co-design workshops
- ▶ Self service access to Employee Portal
- ▶ Knowledge Management on-line

IS customer Journey

Mia IS – Supporting Home Working



Mia's Situation

Mia works as an administrator in Adult Social Care and Health. She is recovering from a long term illness and needs to work from home. Her confidence level is low. She is part of a virtual team and needs to be able to contribute to the team's service levels.

Experience

Mia is preparing for her return to work and deciding how she can best work from home. Her flat has limited space so she has decided the 'Bring Your Own Device' service suits her best because she can use the personal laptop she bought under the council's scheme.

Last week, Mia logged onto the Service Portal and made a request for a home worker setup. The Service Desk contacted Mia to agree a convenient time and she is due for a visit today.

A member of the IS Touch Services team visits Mia's flat with her new phone, printer and 'Becrypt' stick, which turns her own laptop into a work terminal. She shows Mia how to use all these tools.

Mia logs on to the office to catch up on emails and look at her schedule ready for her return to work. She also makes a few calls and prints off some documents to read offline. Once complete she logs off and removes the 'Becrypt' stick so her son can use the laptop to do his homework.

Mia's first full day back at work. She joins a team meeting via video conference and is welcomed back by her colleagues. She is given some cases to progress and logs into the office to access them. She also uses phone and email to set up meetings between social workers and service users next week. Mia needs to complete her return to work process and is able to do so online.

Mia takes a call from one of the social workers who asks her to arrange a medical assessment for a client. Mia can book this online through an NHS portal available through her office desktop. There are also a series of case conferences to organise by the end of the day but Mia cannot access the scheduling system. She calls the IS Service Desk who access her computer remotely and resolve the problem while she is on the phone, enabling her to complete the schedule on time.



Moments of Truth

- ▶ Easy return to work after illness
- ▶ Need to work from Home
- ▶ Return to Work
- ▶ Easy access to office systems to add value to team

Key Enablers

- ▶ HR Self service portal, IS Service Portal
- ▶ IS Service Desk Touch Services
- ▶ Communication tools, use of own laptop
- ▶ Remote working desktop experience is identical to being in the office

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Estates

Estates Time scales and overview

Proposed support location						
Barnet						
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FTE outside Barnet						
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Manager training					02/04/13	
Capita Service commencement Date					01/04/13	
Payroll helpline launches					15/04/13	
First Capita payday					26/04/13	

Estates Timescales

Key Activities	Start Date
Staff Consultation commences	07/01/13
Presentation to Estates Staff	08/01/13
Information Verification and commencement of IPAMS development	09/01/13
Resource Review & Action Plan	14/01/13
Establish Joint Working Party	14/01/13
“Meet and Greet” Session	01/02/13
Mentor Mobilisation	01/02/13
Establish Strategic Asset Management Group	11/02/13
Desktop training and “dry run”	01/03/13
Desktop GO Live	31/03/13
Capita Service commencement Date	01/04/13

Estates - Transformation & Operational Resources

Transition Team (first 5 months)

Transition Lead
Ian Brown

Transition Manager
Estates
Kevin Shutter

Transition Manager
Facilities
Ian Summerton

Transition Manager
Agile Working Policy
Mark Bradshaw

PMO
Lorna Hayes

Transformation (first 12 months)

Finance/Admin

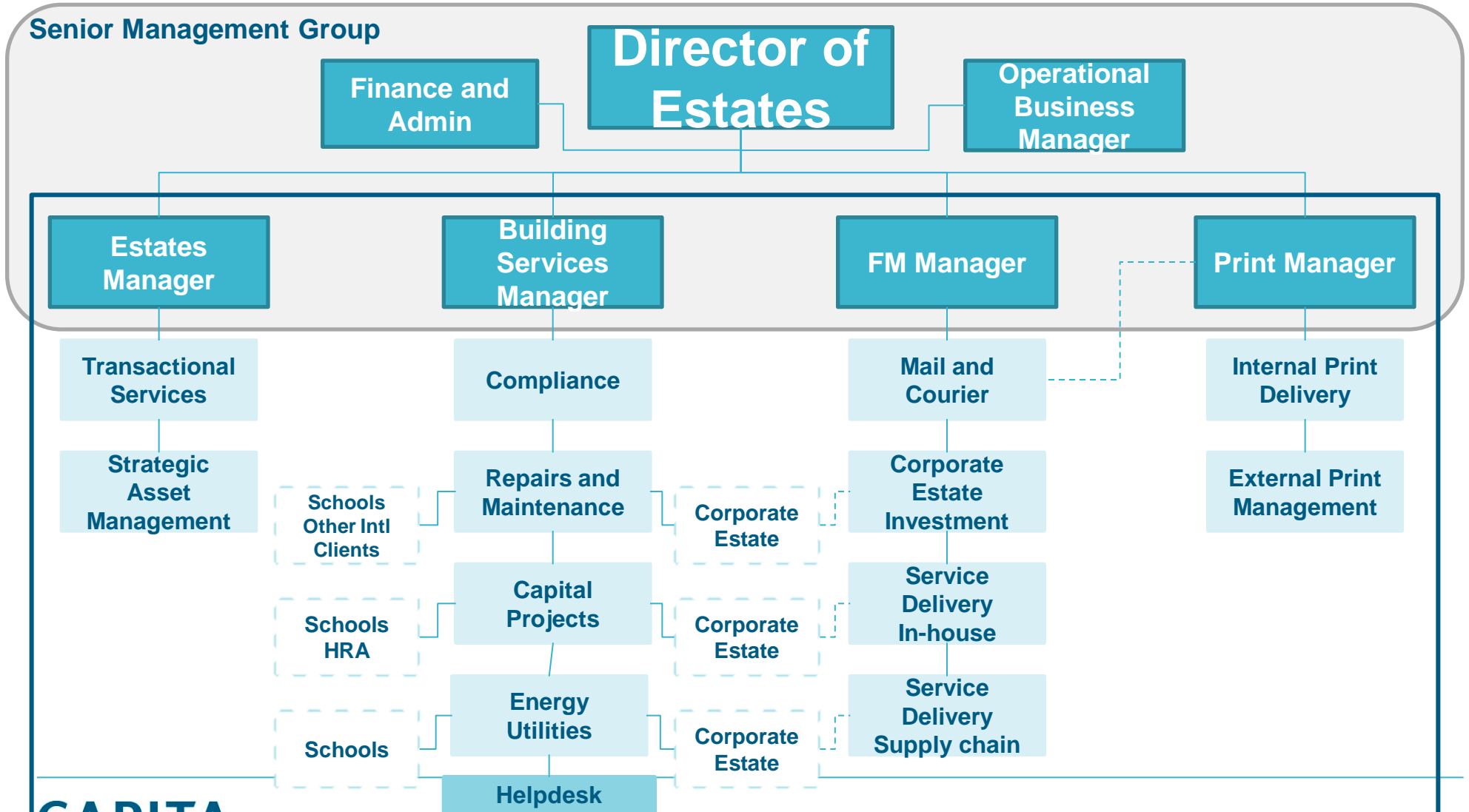
Director of Estates
TBC

Operational Business
Development

Capita Symonds Support

See Next Slide

Estates Structure



Estates Solution Overview

Key Aspects of Our Solution (Service Specific)

Implement a new integrated property management system (IPAMS)

- Single view of the asset & Single version of the truth

Transfer the investment estate into Capita's Real Estate business

- Improve rental income & Decrease voids

Implement a new Corporate Landlord Function (CLF)

- Reduce property costs across the estate
- Improve use of the Councils assets

Deliver an Agile Workplace programme (AWP)

- Reduce future property requirements across the Council
- Provide a portfolio aligned to customer service requirements

Invest in additional strategic resources to develop property strategy

- Reduce cost of property to the council

- Increase the value of the Councils estate through development opportunities

- Integrate public sector and deliver a 'neighbourhub' approach to citizens

In source all design fees for capital and revenue projects

- Reduce design fees within LBB
- Improve project delivery

Integrate service delivery into a single team approach

- Improve service delivery
- Reduce the cost of services

Implement a managed account approach to treat pass through revenue

Key Outcomes

- Exit NLBP 4 2015 - net £28M savings guarantee
- Increase investment income -£0.5M
- Additional school places provided in new / refurbished buildings at less than current model
- A future property portfolio aligned to customer access strategy.
- Improved use of assets through the CLF
- Improved service delivery within building operations
- Potential for exiting Barnet House – current cost is £1.7m p.a
- 5% reduction in energy consumption across the corporate estate guaranteed and target to deliver 10%+
- Increased capital receipts from development activities
- Co-design services with customers

Estates Customer Journey

Claire Asset Management Planning



Services Access

Org. Position

Capability

Case Expertise

Experience

Claire's Situation

Claire is a senior officer in Communities who has been given the task of writing a report about rationalising the use of properties under her department's budget control. This is not Claire's normal area of expertise but she is very conscientious and wants to deliver a good report because she knows how important it is to her department.

Experience

<p>Claire decides that the first thing she needs to know is where all the properties are, so she contacts the Estates Department. She is put into contact with Mike, the Estates Customer Service Manager responsible for liaison with her department to arrange a meeting.</p>	<p>Mike quickly understands the requirements of the report and they agree to work together. First he is able to go online and bring up all the data for the properties. Mike explains that this is a new initiative, IPAMS, and is a single source of all property information.</p>	<p>They quickly have a complete picture of the properties in terms of lease and freehold, operating cost and backlog liabilities. Using this information along with some benchmarks, Claire is able to rank the costs for each building.</p>	<p>Mike is able to source additional information about the demographics in the localities from the Insight Engine; also the Strategic Corporate Asset Management Plan has supporting information that helps put the possible solutions in context. One such solution is the 'Neighbourhub' part of the localities strategy.</p>	<p>The Neighbourhub is designed to help deliver the right services in the right location in a timely manner. This improves the quality of lives of citizens of Barnet and at the same time helps LBB to improve the utilisation of its assets across the Borough. They realise a couple of the buildings designated at risk are ideally placed to be partly converted.</p>	<p>As a bonus, Mike explains to Claire that Real Estate Services is included in the Capita team and he is sure they will be able to suggest how the disposal of another of the properties may be able to provide the money to fund the whole process.</p>	<p>Claire can now draft her report. Access to real time data means that she has more time to consider the quality of outcomes. The support in helping her find possible alternative uses which may help share the cost and avoid closure altogether is very compelling. She is confident the report will be well accepted.</p>
Estates	IPAMS		Insight Engine SCAMP		Capita Real Estate	

Moments of Truth

- ▶ Expert, accessible assistance with Asset Management
- ▶ Access to multiple sources of relevant, quality data
- ▶ Additional, bonus option available

Key Enablers

- ▶ Asset Management expertise
- ▶ Customer service approach
- ▶ Single source of property information
- ▶ Insight Engine
- ▶ Wider Capita capabilities

Estates Customer Journey



Mark

AgileWorking, NeighbourHubs, Print and Mailing



Mark's Situation

Mark lives in Edgware and is a Health and Safety advisor for LBB. His work consists of visiting schools, libraries, community centres and other council premises advising on H&S and risk analysis. Mark used to be based in NLBP but through consultation as part of Agile Workplace initiative was determined to be an Agile Worker i.e. mostly works out of the office but needs to have an occasional base in NLBP.

Experience

When first consulted on Agile Workplace and designated as an Agile Worker, Mark is a little anxious about losing his desk and sceptical that he could really 'let go'.

Mark is concerned that he has to write reports following visits then ensure that these are quickly distributed to his clients, with copies retained on file. The reports occasionally contain confidential remedial action plans and he likes to ensure the client has a hard copy mailed to them, as well as an electronic version.

Working with Mark, Capita Agile Working experts analyse Mark's workflow and requirements. They personalise training and resources to make sure he has the right tools and the confidence to use them.

Having taken the plunge and been an 'Agile' worker for a few weeks, Mark has put his scepticism well behind him. Wherever he is in the Borough, he never seems to be too far away from a Neighbourhub or library where he can find a hot desk and printer or MFD. From his laptop, he is able to download the right forms and print them off - all he has to do is enter his pin number and the server finds and recharges his cost centre.

Once he has completed a visit, he finds it easy to complete his report while all the details are fresh in his mind. Using OneM@I from an icon on his laptop, he can select the report and send it to the Print Centre where it will be printed and sent out by mail. To give him confidence, he is able to track the report from submission through to mailing.

Mark hardly thinks about his old desk these days. The Neighbourhubs and hot desks are well situated on bus and tube routes, which makes it much easier than going in and out of NLBP. As an added bonus, Mark saves on CO₂ emissions, so feels he is doing his bit for sustainability as well.

AgileWorking Team

Neighbourhub

Print Centre

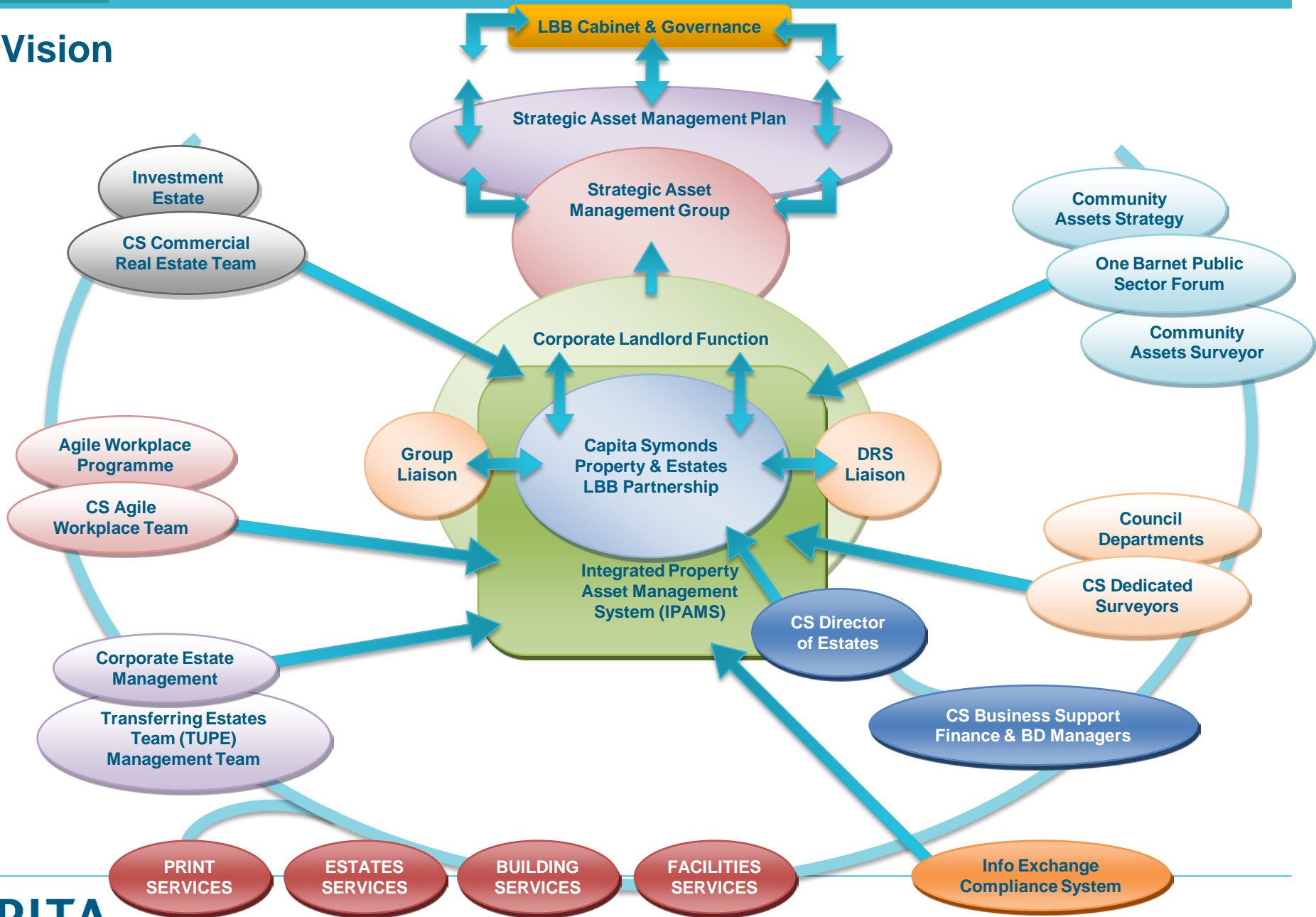
Moments of Truth

- ▶ Expert assistance with agile working
- ▶ Access to Neighbourhubs, hot desks and printing
- ▶ Ease of report creation/distribution

Key Enablers

- ▶ Agile working team
- ▶ Neighbourhub development
- ▶ Print Centre

The Vision



Questions...?

If you have any further questions please feel free to contact us-

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Kevin Shutter- kevin.shutter@capita.co.uk

Ian Summerton- ian.summerton@capita.co.uk

Lorna Hayes- lorna.hayes@capita.co.uk

CAPITA



Procurement

Solution Overview – Procurement

Key Aspects of Our Solution (Service Specific)

Service Delivery

- Drive down 3rd party expenditure in a fully compliant manner
- Optimise local and 3rd sector supply
- Strategic commissioning via insight
- Make the council easier to do business with

Customer Support

- Develop co-design and citizen inputs into future procurements
- Provide a single on line portal for suppliers and customers
- Develop the local supply market through the creation of a local supply champion

Knowledge Transfer

- All procurement staff will be given the opportunity to achieve the appropriate level of CIPS qualifications
- All staff given access to opportunity for project management and other training through the Capita People Development
- Increase in the skills of the transferring staff through the provision of knowledge and skills transfer from Capita experts

Compliance Management

- Contract Compliance with 98.6% of all contracts Let and managed
- Make 100% of all contracts it lets compliant with the London Procurement Pledge
- 95% of all contracts let will meet 100% of the KPIs

Technology

- Investments in :-Project tracking-Benefits Tracking-Desktop Dashboard Reporting—Online Contracts Database
- Increased usage of e-Sourcing
- Development of Supplier Portal

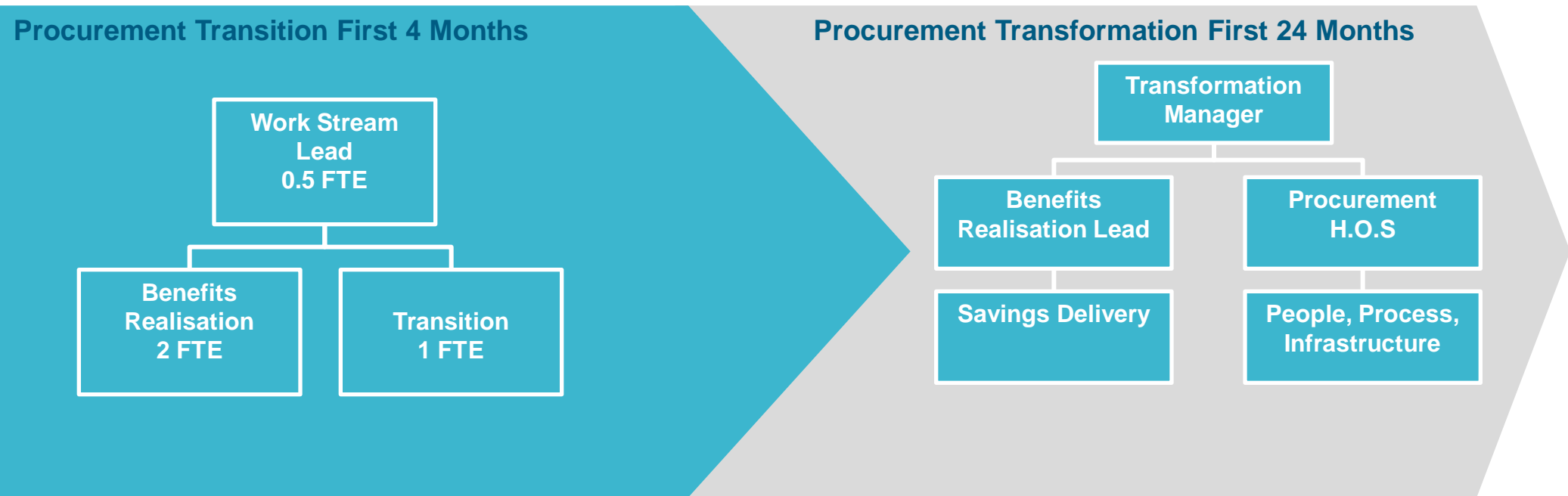
Key Outcomes

- Deliver £71m cashable savings
- Best value commodity goods and services procured
- Improvement in flexible framework scoring
- Council is an exemplar for right sourcing
- Reduction in customer and supplier queries
- Deliver new markets and a thriving local supply chain
- Supply Chain understands how to win business with Barnet
- Team are equipped with the right commissioning and procurement skills
- Drive a continuous improvement in Procurement
- Development of local eco-system
- Co design services with Commissioners

Procurement Time scales and overview

Proposed support location						
Location outside Barnet - Southampton						
	Service Commencement Date (SCD)	Adjustments at SCD	End of Transition period		End of Transformation period	Partnership Completion 31/03/2023
Date	01/04/13	01/04/13	19/12/13	31/03/14	31/03/16	Barnet FTEs
FTE in Barnet	16.67	15.67	15.67	15.67	14.67	7.00
FTE Outside Barnet					5.67	4.67
Key Activities					Start Date	
Staff Consultation Period					07/01/13	
Staff Bulletins and Consultation Updates					07/01/13	
Due diligence / Opportunity Assessment					07/01/13	
Ask Capita/One to Ones TBC					01/03/13	
Pension & Benefit Roadshows					10/03/13	
Verification Letters					15/03/13	
Manager training					02/04/13	
Capita Service commencement Date					01/04/13	
Payroll helpline launches					15/04/13	
First Capita payday					26/04/13	
Transition to Southampton					01/05/15	

Procurement Transition & Operational Resources





Helen



Helen's Situation

Helen is a commissioner in the Adult Social Care team and has been previously managing the tendering and contract management activity for a number of complex spend areas. This has meant that the majority of Helen's time has been spent on commercial activities rather than supporting the operational requirements of her role.

Experience

Helen has an initial meeting with Jeff, the new embedded business partner for Procurement and understands that there is now a central team of flexible expertise to support her in tendering key spend areas. Jeff spends time to understand Helen's current ways of working, challenges and future strategic objectives. They agree that procurement can help Helen to develop a procurement strategy and provide commercial expertise that will achieve the best outcome for the unit, and running the tendering activity to ensure compliance.

Helen mentions that due to previous initiatives the Standing Orders and CPR's within the council are rigid and don't allow her the flexibility to deliver outcomes and drive best value. Jeff assures her that the nature of requirements and maturity of the market will be taken into account - since Adult Social Care falls under Part B of the regulations, there is greater scope to adapt the process whilst remaining compliant, and the team have experience of investing in developing nascent markets. In parallel, a separate project is launched to ensure the policies and processes in the centre are fully compliant, but allow delivery units the flexibility they need. Jeff works with Helen and her colleagues to workshop the issues and co-design the future CPR's.

Jeff introduces Helen to Graham, a procurement expert with over 10 years procurement experience in the ASC sector. Graham has worked with multiple authorities and has relationships at a strategic level with a number of the providers that Helen works with on a day to day basis. The outline project is defined in a Project Initiation Document which includes the roles, scope and outcomes that Helen and Graham are looking to deliver. The project is jointly governed with health commissioners to ensure an integrated pathway.

Graham works with Helen to define the procurement strategy and specification of requirements. This is done based on several aspects of additional information, including the Council's needs assessment and additional evidence from the insight team; insight of the current market place based on the Procurement teams knowledge and available data sources - this includes voluntary sector organisations and local suppliers; current ways of working and review of previous contracts - what worked, what did not work well; a review of related services to ensure an joined up approach and avoid duplication; co-design workshops with citizens and user advocacy groups (this includes exploring redesign of the service to place greater responsibility on the citizen and their own support network such as the family); supplier feedback; work other authorities and collaborative hubs are doing; and 3rd Sector feedback.

Once the specification is agreed, Graham informs the Procurement Local Supply Champion who engages with SMEs and the 3rd sector to how he can support development of the local supply ecosystem by providing early visibility. Helen fully supports this activity and is keen to work with and develop local small, medium enterprises and voluntary sector by supporting procurement at supplier forums, training on public sector procurement rules and providing transparency of all her future tenders.

Business Partner

Procurement SME

Moments of Truth

- ▶ Access to knowledgeable Business Partner
- ▶ Responsiveness to issues
- ▶ Access to procurement expertise
- ▶ Support through joint working

Key Enablers

- ▶ Flexible CPR's and Standing Orders
- ▶ Access to Market Knowledge and Insight
- ▶ Skilled Procurement professionals
- ▶ Understanding the requirements of the delivery unit
- ▶ Business Partner support



Helen



Helen's Situation

Helen has agreed a specification with Procurement expert Graham (see Sourcing goods and services – Specification). Before tendering, she would like to test the market to see the appetite and also to ensure the specification is optimum for the supply market.

Experience

Helen and Graham meet multiple suppliers to gain feedback and discuss the proposed tender and specification as part of a soft market test organised by Graham. All amendments are discussed and a final specification is drafted and signed off along with the preferred procurement route. In this case, Graham and Helen agree that an open process meets their requirements.

Helen and Graham agree the evaluation criteria for the tender and post the notice on the council's supplier portal as well as via special social care journals. Whilst not required for Part B services, an optional notice is placed in OJEU to access as wide a market as possible. The local supplier champion makes relevant local SME's or 3rd sector organisations aware of the tender to ensure their involvement in the process.

Clarification questions come into the Procurement team who gain information from Helen as required and circulate back to the participating suppliers. All of the tender responses are completed via the e-procurement portal and the procurement team provide Helen with copies of each response.

Helen, various other key stakeholders and Graham meet the suppliers to understand their offer and service delivery model in more detail. Following completion of the evaluation, where Helen reviews the operational aspects and Graham the commercial aspects, a recommendation report is produced by Procurement for Helen to review.

Once Helen and the Adult Social Care leadership team are happy with the recommendation, Graham works with Helen and the Council legal team to ensure the most appropriate contract is put in place and includes flexibility for the council and also rewards the provider for continued cost saving and innovation.

Once the contract is signed, the procurement team fully support Helen with any change of supplier and ongoing implementation to ensure the supplier is performing. Helen and Graham meet the supplier quarterly to review performance. Any issues are discussed and corrective actions put in place as well as future innovations discussed and planned.

Procurement SME

Procurement Team

Moments of Truth

- ▶ Access to expert knowledge of procurement processes and contracting
- ▶ Support from SME and Procurement Team

Key Enablers

- ▶ Market Knowledge and Insight
- ▶ Skilled Procurement professionals

CAPITA



Corporate Programmes

Corporate Programmes

Corp Programmes Solution Overview

Key Aspects of Our Solution (Service Specific)

- Initial list of in-flight projects agreed for transfer and final list of projects to be agreed shortly – all teams delivering in-flight projects will transfer with projects that Capita delivers
- Integrate the service into our NSCSO change capability:
 - Single PMO across all change reporting into TD (improved capability around benefits tracking & change management)
 - One Barnet integrated to NSCSO Transition & Transformation
 - Capital Programmes integrated to Estates Capital team
 - New school designs service offered when Kier contract expires
 - Develop the Council's PPM environment
- Baseline in-flight projects to:
 - a) Identify projects where we can extend benefits & guarantee
 - b) Accept projects on T&M basis with cost, time, & quality KPIs
 - c) Accept projects on a T&M basis without KPIs
- Build new Transformation pipeline
- Build new Construction pipeline

Key Outcomes

- Effective approach to managing benefits realisation
- Fully integrated approach to change management
- Additional school places provided in new / refurbished buildings at less than current model
- Extended and deliver the LBB savings projected in their MTFS
- Strengthened PPM environment across the Council
 - Effective programme governance
 - LBB managers developed through Management Academy

Corporate Programmes Time scales and overview

Proposed support location	
Barnet	
Key Activities	Start Date
Staff Consultation Period	07/01/13
Staff Bulletins and Consultation Updates	07/01/13
Project due diligence	07/01/13
Agreement of which projects will transfer	04/03/13
Ask Capita/One to Ones TBC	11/03/13
Pension & Benefit Roadshows	11/03/13
Verification Letters	15/03/13
Manager training	02/04/13
Capita Service commencement Date	01/04/13
First Capita payday	26/04/13

CP - Transformation & Operational Resources

Due Diligence Team (first 3 months)

Transformation Director
Rob MacDougall

Transformation Manager
Ed Temple

Project Manager
Rav Singh

Operations (post SCD)

Transformation Director
Rob MacDougall

Transformation Manager
Ed Temple

CAPITA



HR Payroll Service

HR Solution Overview

Key aspects of our Solution

Channel Shift

- Provide Self Service and Self Help to Schools
- Provide access to Self Service for hard to reach staff via Touch Tone Telephony
- Enhance range of Self Service and Self Help options

Service Delivery

- Shared Service Centre for:
 - tracking and resolution of first line queries
 - transactional processing incl. Payroll
 - HR expertise incl. Recruitment
- Face to face support for:
 - BP strategy and support
 - Employee Relations Case Management
- **Train and develop HR managers to become effective Business Partners**
- **Strengthen and support BP's and the ER team with Subject matter expertise from across Capita & support transformation**
- **Enhance Intranet content, search facility and knowledge management**

Key Outcomes

- Co-design services with customers
- Enhanced Self-Help - we will ensure the HR intranet is a detailed source of HR information which is easy to use and informative, driving policy awareness and compliance
- Transparent, efficient and accessible Self-Service for employees, enabling them to control their employment information
- Empowered managers becoming more effective with easy access to enhanced management information
- Educating and coaching managers to become self sufficient through effective coaching and education
- Improved processing times through process improvements
- Proactive and early intervention of HR issues or highlighting trends through HR business intelligence
- Preserving positive relationships with Trade Unions

Technology solution

- iTrent for HR professional users and Manager/Employee Self Service
- Employee Portal to support Self Service, Self Help, Reports and links to useful sites
- Transversal , Knowledge Management and natural language search
- K2 , Business Process Management, workflow, forms and triage

- Intelcom, Touch Tone Telephony
- MSDynamics & Jira (CRM) to manage and track HR phone & email contacts
- Info Tracker for SHaW, HartILink for Pensions
- EDRM – Capita Total Document Solutions for scanning and indexing

HR & Payroll Time scales and overview

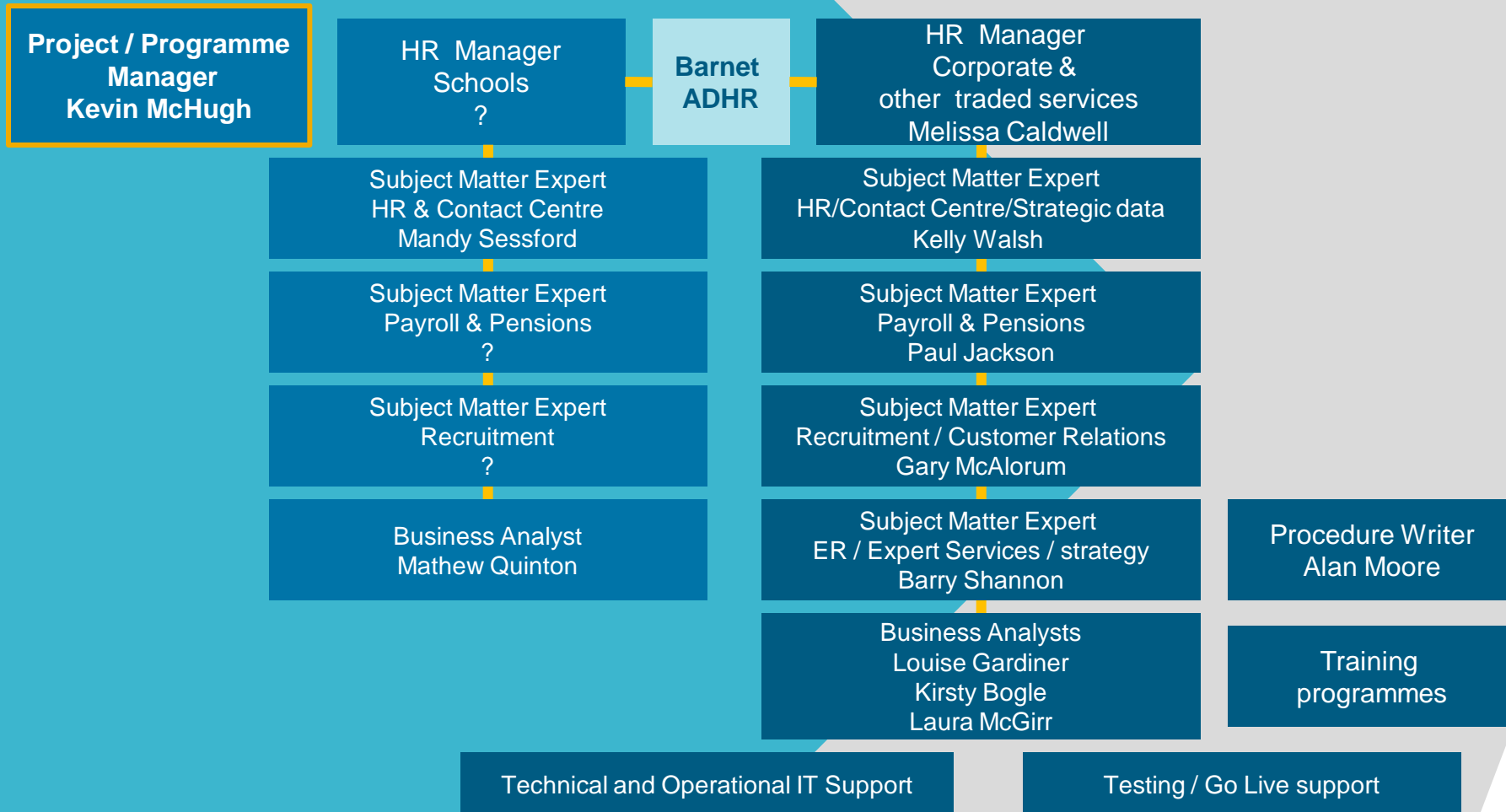
Proposed support location						
Locations outside Barnet: Belfast, Carlisle , Banstead and Sheffield						
	Service Commencement Date (SCD)	Adjustments at SCD	End of Transition period		End of Transformation period	Partnership Completion 31/03/2023
Date	01/04/13	01/04/13	19/12/13	31/03/14	31/03/15	Barnet FTEs
HR FTE in Barnet	75.28	59.52	42.26	42.26	10.52	10.11
Pension FTE in Barnet	11.76	11.76				
FTE outside Barnet			26.21	25.71	36.89	32.40
Key Activities					Start Date	
Staff Consultation Period, Bulletins & Consultation Updates.					07/01/13	
Due diligence					07/01/13	
Ask Capita/One to Ones TBC					01/03/13	
Pension & Benefit Road shows					10/03/13	
Verification Letters					15/03/13	
Capita Service commencement Date					01/04/13	
Manager training					02/04/13	
First Capita payday					26/04/13	
Transition to Banstead and Sheffield (Pensions)					01/08/13	
Transition to Carlisle (Schools)					01/12/13	
Transition to Belfast (Corporate & Other traded services)					01/04/14	

Health, Safety and Wellbeing timescales and overview

Proposed support location							
Locations outside Barnet: Southampton, London							
	Service Commencement Date (SCD)	Adjustments at SCD	End of Transition period		End of Transformation period	Partnership Completion 31/03/2023	
Date	01/04/13	01/04/13	19/12/13	31/03/14	31/03/15	Barnet FTEs	Outside Barnet
HSW FTE in Barnet	4.0	4.0	1.3	1.3	1.3	1.3	As requested
Key Activities					Start Date		
Staff Consultation Period, Bulletins & Consultation Updates.					07/01/13		
Due diligence					07/01/13		
Ask Capita/One to Ones TBC					01/03/13		
Verification Letters					15/03/13		
Capita Service commencement Date					01/04/13		
Manager training					02/04/13		
First Capita payday					26/04/13		
Transition to Capita Occupational Health Service					01/04/13		
Transition to Southampton (Advisory)					01/08/13		

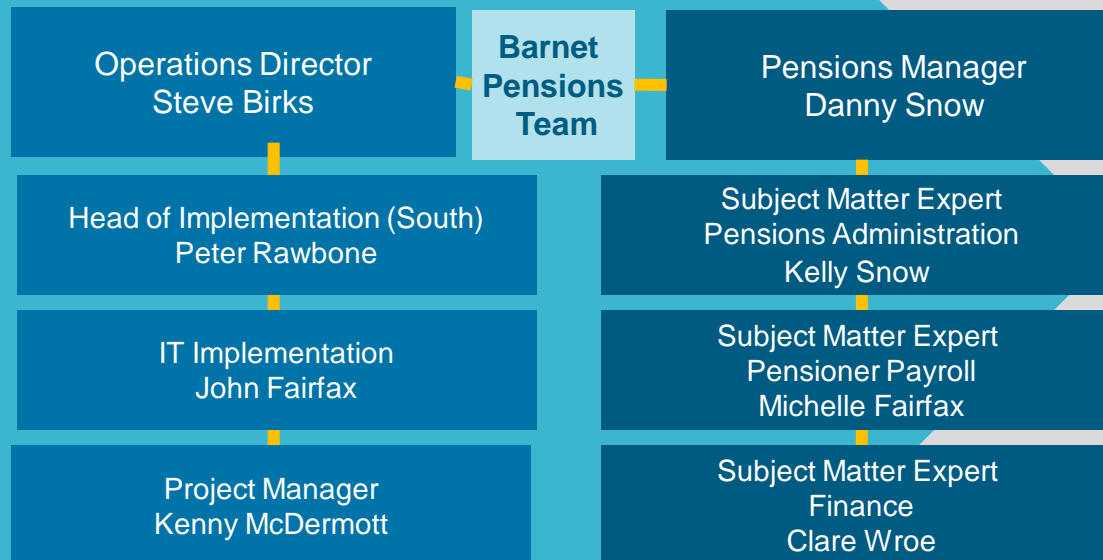
HR & Payroll - Transformation & Operational Resources

Transition and Transformation Team



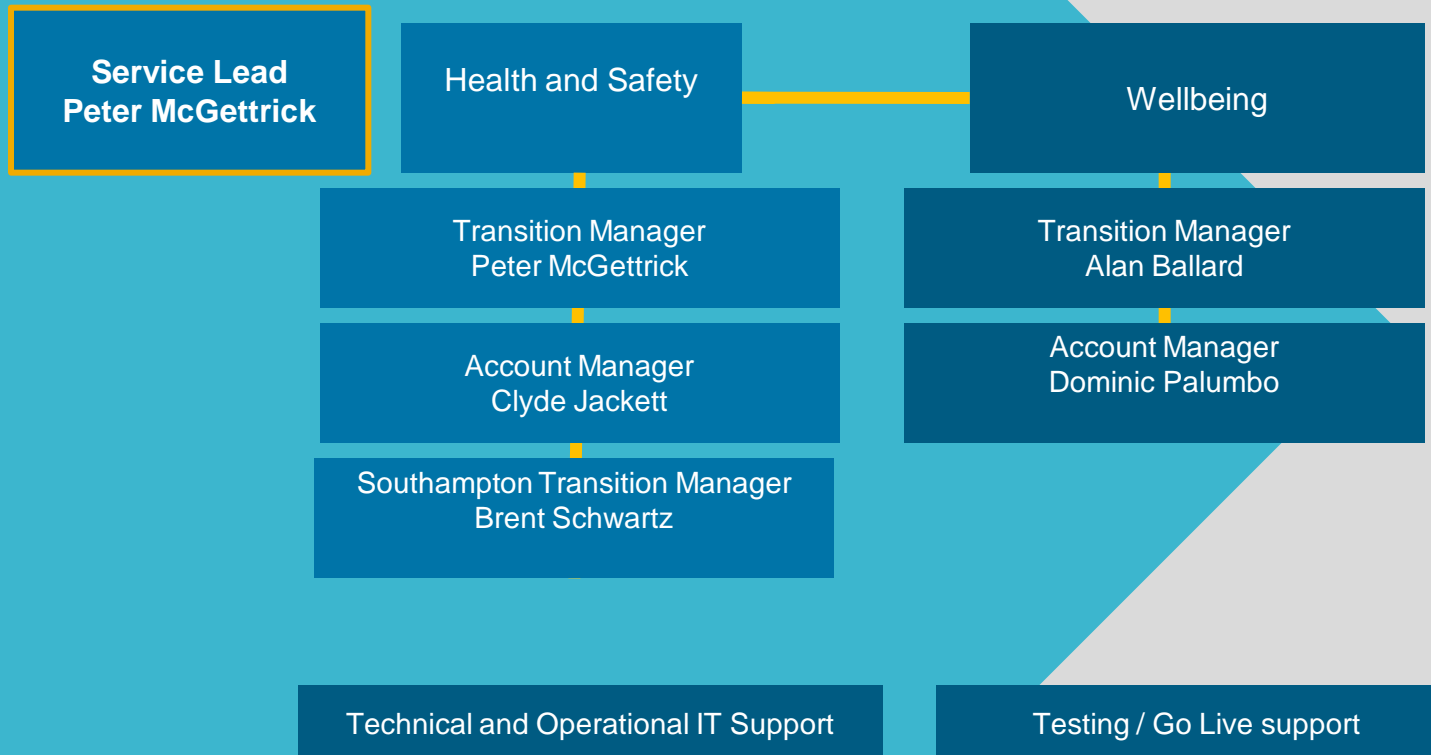
Pensions- Transformation & Operational Resources

Transition and Transformation Team



HSW- Transformation & Operational Resources

Transition and Transformation Team



HR Customer Journey – Performance Management



Amena

Performance management



Amena's Situation

Amena has been in a line management role for 4 years within Adult Social Care and Health, managing 5 direct reports with previously few performance issues.

Experience

Amena receives an automatically generated email advising that one of her direct reports has reached a short term absence trigger. She calls the HR Contact Centre to understand what this means and is guided by the HR Advisor to the Absence Management policy via the HR Portal. During the call, Amena explains that the employee is pregnant and wants to know if she needs to be treated any differently to other employees.

The HR Advisor uses the knowledge base to search for policy information on pregnancy related illness and performance management and is directed to the relevant section in the Maternity Policy. She is confident that the information is comprehensive and up to date. The Advisor relays the information to Amena, suggests she reviews it and if she still needs support to contact again. The Advisor logs the call against Amena's name, so if Amena calls back she will not have to 'start from scratch' and explain again.

Amena reviews the Maternity Related Absence section of the Maternity Policy and meets with the employee to discuss. She feels confident that she has all the relevant information to hand to manage the situation. During the meeting, Amena discovers the absences her employee is taking are not due to her pregnancy, rather they are due to her other child care commitments.

Amena feels out of her comfort zone and is unsure how to manage this without being accused of discrimination, so again calls the HR Contact Centre. The HR Advisor can see the history of Amena's previous call and with the new information presented, decides a case needs to be escalated to an HR Subject Matter Expert to assist. The HR Advisor creates a case and transfers Amena by phone to Carol, an HR SME with relevant skills.

Carol reviews the notes on the case taken by the HR Advisor and summarises this back to Amena to confirm. She directs Amena to the Performance Management Policy (as the absences are not related to the employees pregnancy) and the Managers toolkit available on the HR Portal. Carol talks Amena through these and how to apply the policy to this situation, ensuring it is made clear at all times to the employee that it is not pregnancy related. Carol also suggests that the employee may be referred to the EAP provider via the HR Portal to seek help finding suitable childcare arrangements.

Amena reviews the Performance Management Policy and feels confident that she can manage the situation. She meets with employee and outlines LBB's policy setting clear objectives agreed by both the employee and Amena. As per the Manager's Toolkit, Amena writes the meeting notes up and keeps these for future reference. She also completes the template letter in the Manager Toolkit.

HR Support

HR Support

HR SME

HR Portal

Moments of Truth

- ▶ Easy access to information on policies and procedures
- ▶ Knowledgeable HR Advisors
- ▶ Pro-active HR coaching
- ▶ Confidence building
- ▶ Consistency of advice

Key Enablers

- ▶ Automated alerts
- ▶ HR Advice and guidance available when required
- ▶ Self Service knowledgebase
- ▶ Manager Toolkit

HR Customer Journey – Leave Request



Jasmine

Leave Request

Services Access



Org. Position



Capability



Case Expertise



Experience



Jasmine's Situation

Jasmine is a Clerical Assistant in the Library Service. Her partner has sent her a text to say that he has the opportunity of a cheap 2 week holiday in Italy, but has to know within a couple of days if Jasmine can go.

Experience

<p>Unsure of what annual leave entitlement she has left, Jasmine logs in to the HR Portal. It's the first time she's used it since Capita took over the service and is impressed with how easy and intuitive it is to access and use.</p>	<p>The portal displays the page with links to all her personal details. She clicks on Annual Leave and sees that she only has 8 days left - but needs 10 days! She phones the HR Contact Centre in a panic to see if she 'bring forward' two days from her next years entitlement.</p>	<p>The HR Advisor (Anna) locates the Annual Leave Policy on the Knowledge Base, talks Jasmine through it and advises that it would be at her manager's discretion. The alternative could be to apply for special unpaid leave via Self Service and she directs Jasmine to the Special Leave policy on the Knowledge Base. Jasmine reviews the special leave policy and decides to apply for two days unpaid special leave first and then the holiday afterwards.</p>	<p>Jasmine clicks on 'request absence' from her Self Service menus. She selects the absence type of special unpaid leave and completes the start and end dates. On the same screen she checks to see if any other members of her team are off during that period as it is unlikely her manager will approve time off if several others are off at the same time. Jasmine is relieved to see that only one person has had leave confirmed during the dates required. She therefore submits her request for special leave adding a note to the request to state the reason.</p>	<p>Jasmine is concerned that there will be delay, as she knows that her current manager is off sick. She is pleased to see that she has the ability to select a delegated manager from a pre-defined list to approve the leave request, as this will prevent her having to wait until her manager is back at work before she knows if she can take the holiday.</p>	<p>She is concerned that previously it could take quite a long time to get leave approved as it would often sit in a huge in-tray on her manager's desk. She is therefore relieved when the approval appears in her mail inbox half an hour later. A colleague explains that this is because Capita have put workflow in place that prompts managers to respond, make it easy for them to do so and tells them who else has booked leave at that time. Now that Jasmine knows how easy it is to request leave she quickly requests her annual leave in exactly the same way as she previously did but chooses the leave type as annual leave as opposed to special unpaid leave and submits it.</p>	<p>Once she receives her email to confirm that the annual leave has also been approved she is delighted. However, just to make sure, Jasmine checks her personalised employee portal to find that her Annual Leave entitlement is now 0 days, as the system has updated it based on the manager's approval. Delighted, Jasmine texts her partner to book the holiday and starts to think about the new clothes she'll have to buy!</p>
HR Portal	HR Support		HR Portal		Workflow	HR Portal

- Moments of Truth**
- ▶ Easy access to information on policies and procedures
 - ▶ Self service capability
 - ▶ Support from HR Advisors

- Key Enablers**
- ▶ Manager dashboard
 - ▶ Manager access to HR Portal
 - ▶ HR Advice and guidance available when required
 - ▶ Flags, alerts and text messages

There are four key elements of the NSCSO Transformation



Talent Management

New Roles

Career Development

Personal Development

Skills Training

Coaching

Self Help

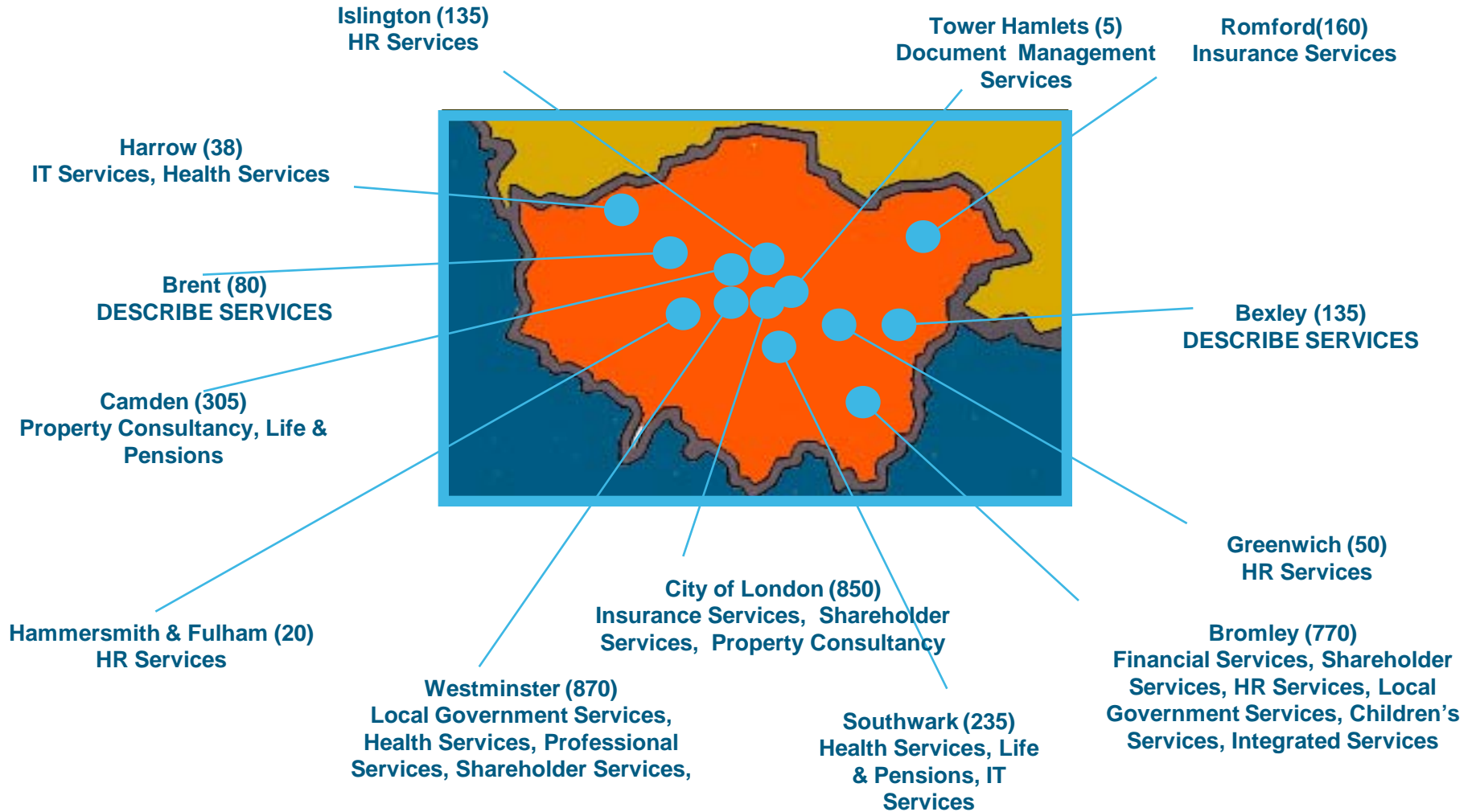
Performance

Transfers

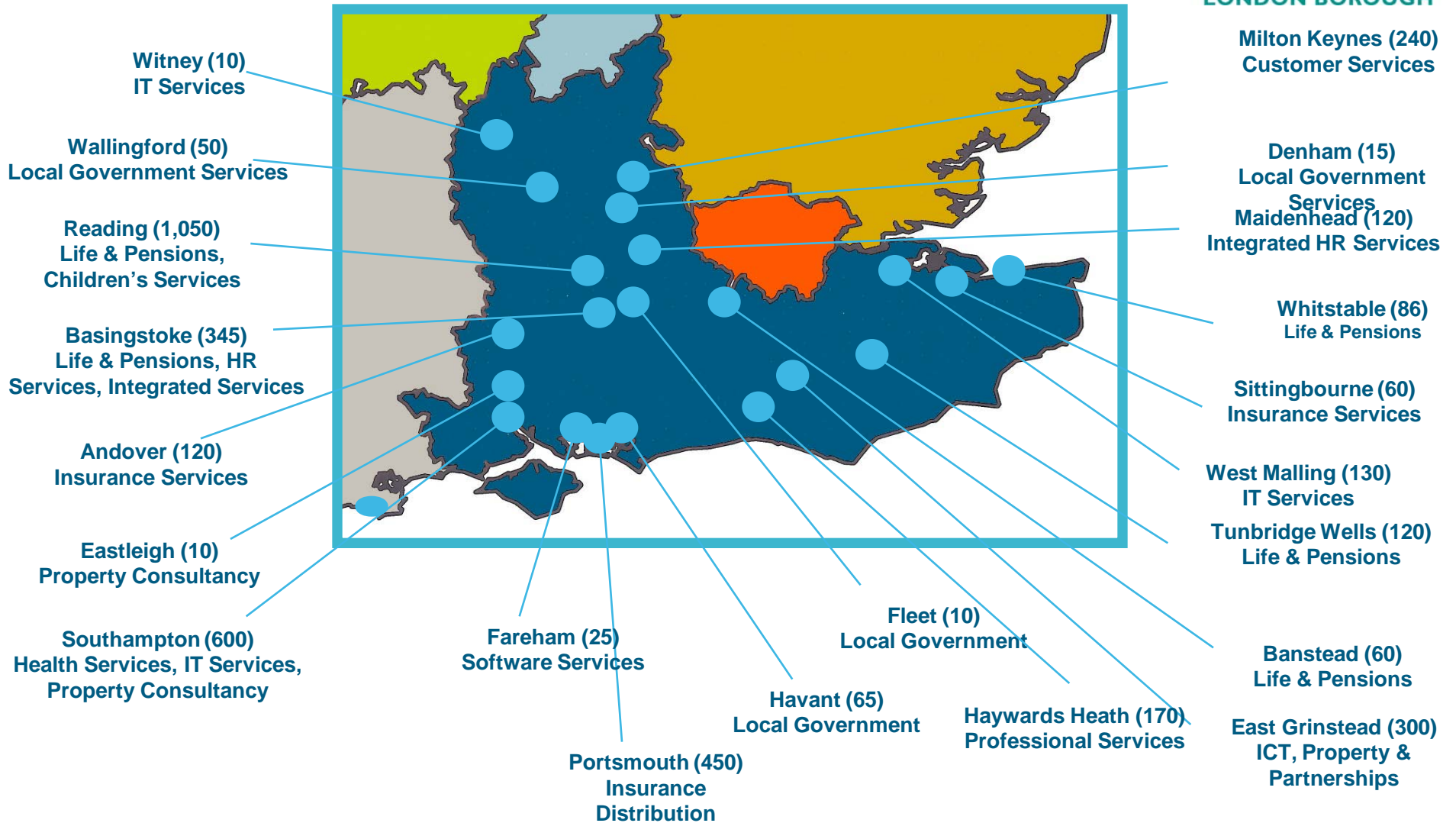
Promotions

Secondments

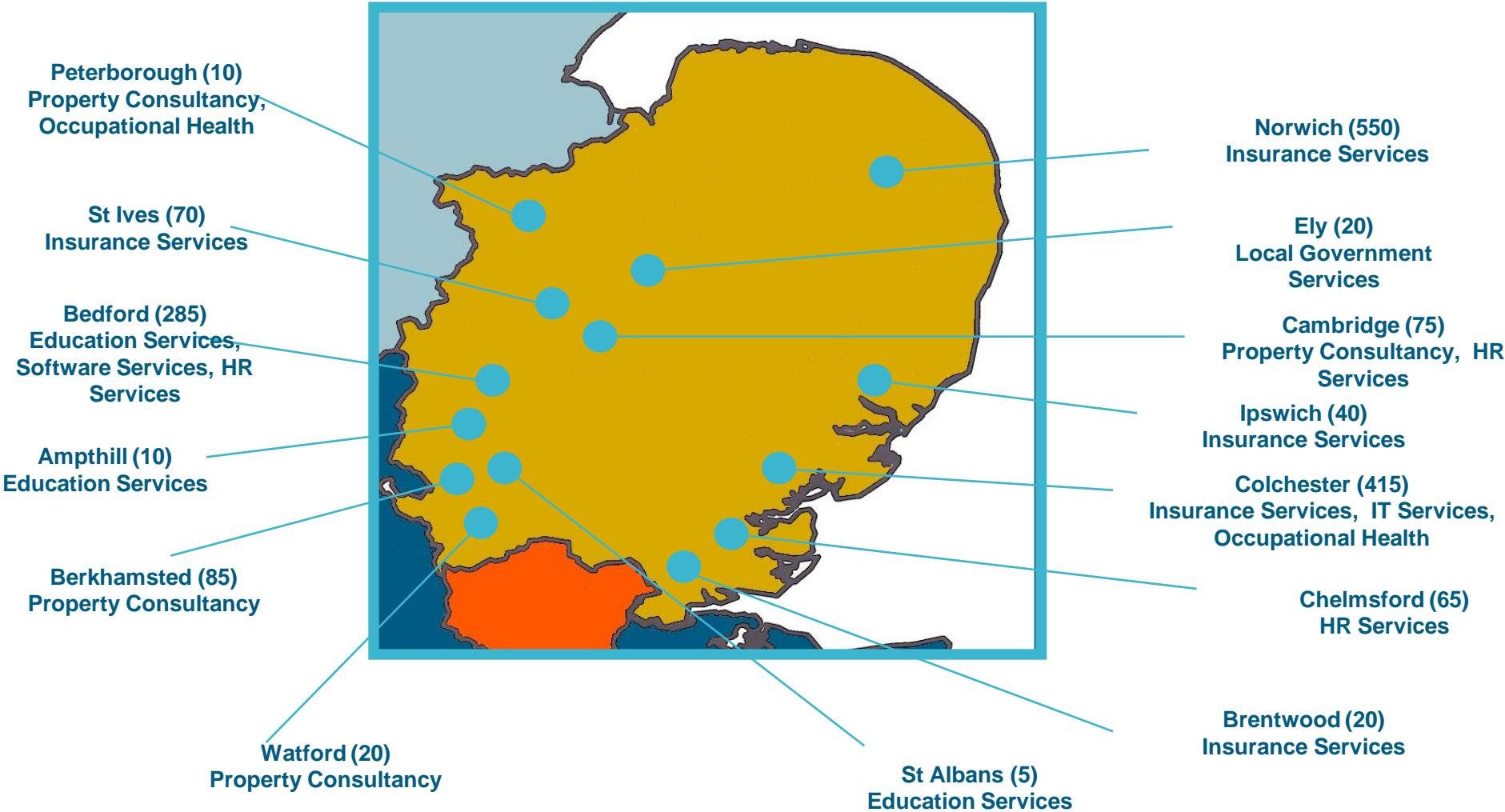
Discovering Capita – In London



Discovering Capita – In The South East



Discovering Capita – In The East of England





Questions and Answers

What happens next?



Thank you for your time today