

**South Ayrshire Council**

**Report by Director of Strategic Change and Communities  
to South Ayrshire Council  
of 29 June 2023**

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**Subject: Future Operating Proposals – Customer Services**

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**1. Purpose**

- 1.1 The purpose of this report is to provide options and recommendations for the future operation of Customer Services.

**2. Recommendation**

**2.1 It is recommended that the Council:**

- 2.1.1 considers the options appraisal (Appendix 1) carried out for this report; and**
- 2.1.2 approves option 3 - Provision of Customer Services by phone, online and face-to-face by appointment.**

**3. Background**

- 3.1 At its meeting of 10 March 2022, Council approved all recommendations for revised workstyles under the Future Operating Model, other than those proposed for Customer Services, and agreed 'that Customer Services should operate as per pre pandemic, subject to Covid regulations, and officers to further consider the model for the delivery of Customer Services'. However, a return to pre-pandemic ways of working on an interim basis was not possible because of significant changes in customer trends.
- 3.2 Customers can currently access the service by phone, by phone appointment, digitally, or face-to-face by appointment from locations in Ayr, Troon, Prestwick, Maybole and Girvan. Details on the current availability of face-to-face Customer Services by location can be found at Appendix 2.
- 3.3 Customer Services is the only team which does not have an agreed workstyle or operating model and the uncertainty of arrangements since March 2022 has had a significant, detrimental impact on staff morale, resulting in the highest turnover the service has ever experienced, which in turn has had a serious impact on our ability to deliver services to customers. In order to stabilise the service and to provide clarity to customers and staff, it is crucial that a decision on the operation of the service is taken without further delay.
- 3.4 In developing options for future delivery, a number of factors have been taken into consideration.

- i. **Changing Customer Trends** - The volume of customer enquiries has not changed significantly in recent years, however the ways in which customers choose to access the service have. In recent years and, prior to the Covid pandemic, customer trends had been shifting steadily towards contacting the service by phone, with the majority of enquiries handled via the 0300 number and footfall in centres decreasing year on year. The Covid period and associated restrictions forcibly accelerated this trend - in 2018/19, 75% of customers chose to access the service by phone and 25% chose face-to-face by drop in; in 2022/23, 90% of customers chose to access the service by phone, with the remaining 10% choosing digital options or face-to-face services by appointment.
- ii. **The need to retain face-to-face services for some customers**– While customers are increasingly contacting the service by phone or online, it is recognised that some people need a face-to-face service. A face-to-face service is therefore currently available by appointment, as detailed in Appendix 2, with 168 face-to-face appointment slots available each week. To date, customer requests for face-to-face appointments have been low, with an average of 54 appointments requested and provided per month from 1 October 2022 –31 March 2023, although it is anticipated that this number may grow. The current substantive staffing establishment (Appendix 3) is sufficient to respond to the current volume of customer enquiries and 168 face-to-face appointments per week when all staff are fully trained.
- iii. **Customer feedback** – Three customer surveys were carried out during 2021 and 2022 to get feedback from the public on their preferred ways of contacting Customer Services. The most recent survey was targeted at people visiting council offices or frontline services. The majority of respondents across the surveys stated a preference for contacting the service by phone or online, with a smaller number of respondents stating a need or preference for a face-to-face service. This feedback mirrors the customer trends which the service has experienced. More detailed feedback from each survey can be found at Appendix 4(i) – 4(iii).
- iv. **Impact on Staff** – Since March 2022, the service has experienced a significant and unprecedented spike in staff turnover, with 45% of trained advisors leaving the service, many citing uncertainty around future working and service delivery arrangements as a factor in their decision to leave. As it takes 12 months to train an advisor to manage the full range and depth of enquiries, this turnover has had an extremely detrimental impact on service delivery and staff morale, increasing call waiting times and placing extreme pressure on the remaining 55% of trained advisors. Staff engagement and consultation on the future operation of the service has taken place regularly. 100% of staff support the recommended option, with 88% saying they would consider leaving if the service has to revert to a customer drop-in model (as per pre-Covid) in addition to managing the high volume of calls. Staff feedback can be viewed at Appendix 5.
- v. **Best value** - It is essential that any recommended model of service delivery is cost-effective and represents best value and that effective management of resources is balanced with delivering the best possible service for customers.

## 4. Proposals

- 4.1 An options appraisal outlining 4 possible options for the future delivery of customer services has been carried out and can be viewed at Appendix 1.
- 4.2 The recommended option is Option 3 - Provision of Customer Services by phone, online and face-to-face by appointment. This is the most efficient and effective way of running the service, offering customers phone, digital and face-to-face customer services. This option reflects customer trends, demand and feedback; is achievable within existing staffing levels; is cost-neutral; and reflects feedback from staff.

## 5. Legal and Procurement Implications

- 5.1 There are no legal implications arising from this report.
- 5.2 There are no procurement implications arising from this report.

## 6. Financial Implications

- 6.1 The recommended option would incur no additional costs.

## 7. Human Resources Implications

- 7.1 There are no human resources implications. The Customer Services team would continue to work on a hybrid basis, providing call handling and face-to-face services by appointment.

## 8. Risk

### 8.1 *Risk Implications of Adopting the Recommendations*

- 8.1.1 There are no risks associated with adopting the recommendations.

### 8.2 *Risk Implications of Rejecting the Recommendations*

- 8.2.1 The risks associated with rejecting the recommendations are: a continued high turnover of staff (88% of staff say they would consider leaving their jobs if drop-in services were resumed); increased pressure on remaining staff; and a high risk of service failure.

## 9. Equalities

- 9.1 An Equalities Impact Assessment (EQIA), **(including the Fairer Scotland Duty in respect of any Strategic decision)**, has been carried out on the proposal contained in this report, which identifies potential positive and negative equality impacts and any required mitigating actions. The EQIA is attached as Appendix 6.

## 10. Sustainable Development Implications

- 10.1 ***Considering Strategic Environmental Assessment (SEA)*** - This report does not propose or seek approval for a plan, policy, programme or strategy or document otherwise described which could be considered to constitute a plan, programme, policy or strategy.

## 11. Options Appraisal

11.1 An options appraisal has been carried out in relation to the subject matter of this report. Details are contained in Appendix 1.

## 12. Link to Council Plan

12.1 The Customer Services Team are an enabling service, supporting services to deliver on the wider council plan.

## 13. Results of Consultation

13.1 There has been public consultation on the provision of customer services. Feedback from customer surveys can be found at Appendix 4.

13.2 Consultation has taken place with Councillor Martin Kilbride, Portfolio Holder for Buildings, Housing and Environment, and the contents of this report reflect any feedback provided.

13.3 Consultation has taken place with Trade Unions and the contents of this report reflect any feedback provided.

13.4 Consultation has taken place with staff and the contents of this report reflect any feedback provided.

## 14. Next Steps for Decision Tracking Purposes

14.1 If the recommendations above are approved by Members, the Director of Strategic Change and Communities will ensure that all necessary steps are taken to ensure full implementation of the decision within the following timescales, with the completion status reported to the Cabinet in the 'Council and Cabinet Decision Log' at each of its meetings until such time as the decision is fully implemented:

<b><i>Implementation</i></b>	<b><i>Due date</i></b>	<b><i>Managed By</i></b>
Implement operating model	With immediate effect	Service Lead - Organisational Development and Customer Services
Deliver series of briefings to frontline services on use of customer contact eform	1 April 2024	Service Lead - Organisational Development and Customer Services

**Background Papers** [Report to South Ayrshire Council \(Special\) of 10 March 2022 - Future Operating Model](#)

**Person to Contact** Gillian Farrell, Service Lead - Organisational Development and Customer Services  
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E-mail [gillian.farrell@south-ayrshire.gov.uk](mailto:gillian.farrell@south-ayrshire.gov.uk)

**Date:** 9 June 2023

## Appendix 1 – Customer Services Future Operation - Options Appraisal

Option 1 - Return to the pre-pandemic model of service delivery, handling enquiries by phone, online and face-to-face by drop-in from five Customer Service Centres.		
	+	-
<b>Customers</b>	Customers can access services on a face-to-face drop-in basis, by phoning or online.	<p><b>Customer data and trends do not support a move to drop-in face-to-face services.</b> <i>Face-to-face customer services by appointment are currently available. The current uptake of face-to-face appointments is low and the volume of available face-to-face appointment slots is more than adequate to meet customer demand for face-to-face services.</i></p> <p><b>Feedback from customers does not support a move to drop-in face-to-face services</b> – <i>As detailed in survey feedback at Appendix 4, the majority of customers prefer to contact the service by phone or digitally. A small number of respondents said they need or prefer a face-to-face service and this need is being met via the current face-to-face appointment system.</i></p>
<b>Staff</b>		<p><b>Staffing levels are not adequate to provide face-to-face drop-in services.</b> <i>Given the significant trend over the last 3 years for customers to contact the service by phone, the current staffing establishment is at full capacity managing phone, digital and face-to-face appointments. An additional 6-8 advisors would be required to operationally run 5 drop-in centres, 5 days per week and to manage a drop-in service.</i></p> <p><b>Further high staff turnover is anticipated if this option is selected.</b> <i>When asked to rank options, no staff selected this option as favourable, with many commenting that a return to drop-in makes no business sense and a face-to-face by appointment service is a more effective way of managing customer enquiries. 88% of staff stated this option would have a negative impact on their morale and they would consider leaving the service. Any further staff turnover, coupled with the training time required for new staff, will result in additional pressure on the team and risks service failure.</i></p> <p><b>An extended implementation period would be required</b> <i>(12 – 15 months to recruit and train new staff). This places pressure on existing staff, particularly those who coach and train new advisors.</i></p>
<b>Best Value</b>		<p><b>This option would cost £184,536 - £ 246,048 per year in increased staffing</b> <i>(6-8 advisors including on-costs)</i></p> <p><b>This is the most expensive way of delivering customer services</b> <i>and is not supported by customer trends or feedback. There is no budget for this within the service.</i></p> <p><b>This option would incur building costs</b> <i>Building usage has changed significantly in the past 3 years, with some buildings, such as the former Customer Service Centre in Maybole being agreed as a saving by the Council in 2023. There have also been changes to usage in other buildings where Customer Services were previously located. For example, The Wallace Tower, Ayr would require to be reconfigured as per the previous layout in 2019 and the Thriving Communities team (who have been co-located there for 2 years) moved to alternative accommodation.</i></p>
<b>Summary :</b>	<b>Not recommended</b>	

## Appendix 1 – Customer Services Future Operation - Options Appraisal

<b>Option 2 - Customer Services to operate fully as a contact centre, with customers accessing the service by phone or digitally and no face-to-face option available.</b>		
	<b>+</b>	<b>-</b>
<b>Customers</b>		<p><b>Customer feedback does not support the removal of face-to-face customer services.</b> <i>While customer trends have shifted significantly to phone and digital contact, there are customers who need a face-to-face service.</i></p> <p>This option could also <b>disadvantage those customers who have a particular protected characteristic</b> such as <i>elderly customers and would impact the small number of customers who told us in surveys detailed in appendix 4, that they cannot access services by phone or digitally.</i></p>
<b>Staff</b>		<p><b>Staff feedback does not support this option.</b> <i>Feedback from staff indicates that a Contact Centre only service is not sufficient for all customers and staff are keen to retain a face-to-face option, particularly for customers who are elderly or vulnerable.</i></p>
<b>Best Value</b>	<b>This proposal is cost neutral and no additional staffing is required.</b>	
<b>Summary :</b>	<b>Not recommended</b>	

## Appendix 1 – Customer Services Future Operation - Options Appraisal

Option 3 - Provision of Customer Services by phone, phone appointment, digitally and face-to-face by appointment in each of the 5 towns as per current interim arrangements.		
	+	-
<b>Customers</b>	<p><b>Customers can access the service by phone; by email; digitally or by arranging a face-to-face or phone appointment.</b> <i>This model meets the access needs of all customers as indicated by customer feedback and trends. Customers will be able to access the service in a way that meets their needs i.e. by face-to-face appointment by phoning, emailing or visiting the Customer Services team as per the locations outlined in Appendix 2. On occasion, some customers ask about a customer service from their nearest public facing council office. Going forward, a simple referral form will be made available at public facing buildings, meaning staff in these areas, if presented with an ad hoc customer enquiry, can forward the customer's name and contact details to Customer Services, who will thereafter contact the customer to manage their enquiry or arrange an appointment as necessary. Staff at these locations will not handle customer service enquiries.</i></p> <p><b>The model retains a face-to-face service,</b> <i>with 168 face-to-face appointment slots available each week across the 5 towns. The number of appointment slots will be continuously reviewed and increased if required.</i></p> <p><b>This model is supported by customer trends and feedback</b> – <i>In recent years, customer trends have shown an increase in customers preferring to contact the service by phone or digitally. This trend accelerated over the last 3 years and current data shows 90% of enquiries are made by phone, with the remaining comprising face-to-face appointments and digital interactions. Survey responses and feedback from customers supports the retention of a face-to-face option, with the majority of customers preferring phone or digital options.</i></p> <p><b>The model has been working effectively for 12 months</b> – <i>This service model has been in place since July 2022 and is working effectively.</i></p>	
<b>Staff</b>	<p><b>This model is supported by staff</b> – <i>100% of staff ranked this as the most effective option, as it retains a face-to-face service for customers, as well as providing phone and digital options.</i></p> <p><b>This model requires no additional staffing</b> – <i>Appointments allow more efficient management of the service and, when fully trained, the current cohort of advisors can manage the volume of customer enquiries in a range of ways.</i></p>	
<b>Best Value</b>	<p><b>This is the most efficient and effective way of running the service, offering customers phone, digital and face-to-face customer services.</b></p> <p><b>This is a no cost option and can be delivered within existing resources.</b></p>	
<b>Summary :</b>	<b>This is the recommended option</b>	

## Appendix 1 – Customer Services Future Operation - Options Appraisal

Option 4 - Provision of Customer Services by phone, phone appointment, digitally and face-to-face by appointment as at Option 3 and the introduction of a Customer Services Reception Team to operate across the five main towns, on a co-location basis to provide an initial point of contact for customers and arrange appointments as appropriate.		
	+	-
<b>Customers</b>	Customer Services Receptionists would be trained to help customers with <b>basic enquiries and arrange appropriate appointments</b> with Customer Service Advisors or other relevant council services for more complex enquiries.	<b>Customer trends do not support a requirement for a drop-in face-to-face service for basic enquiries.</b> <i>Customers can already access face-to-face appointments with Customer Services if required. A significant majority of customers (90%) choose to contact the service by phone and the uptake of face-to-face appointments has been low. Customers will be able to ask for a referral to customer services from a range of frontline council buildings/ receptions.</i>
<b>Staff</b>		<b>Staff feedback does not support this option.</b>  <b>This option would require 6 months implementation time - to recruit and train receptionists.</b>
<b>Best Value</b>		<b>This option would cost £131,620 per year in additional staffing costs.</b> <i>There is no budget for this within the service and customer need can be met at no cost under the current delivery model.</i>
<b>Summary:</b>	<b>Not recommended.</b>	

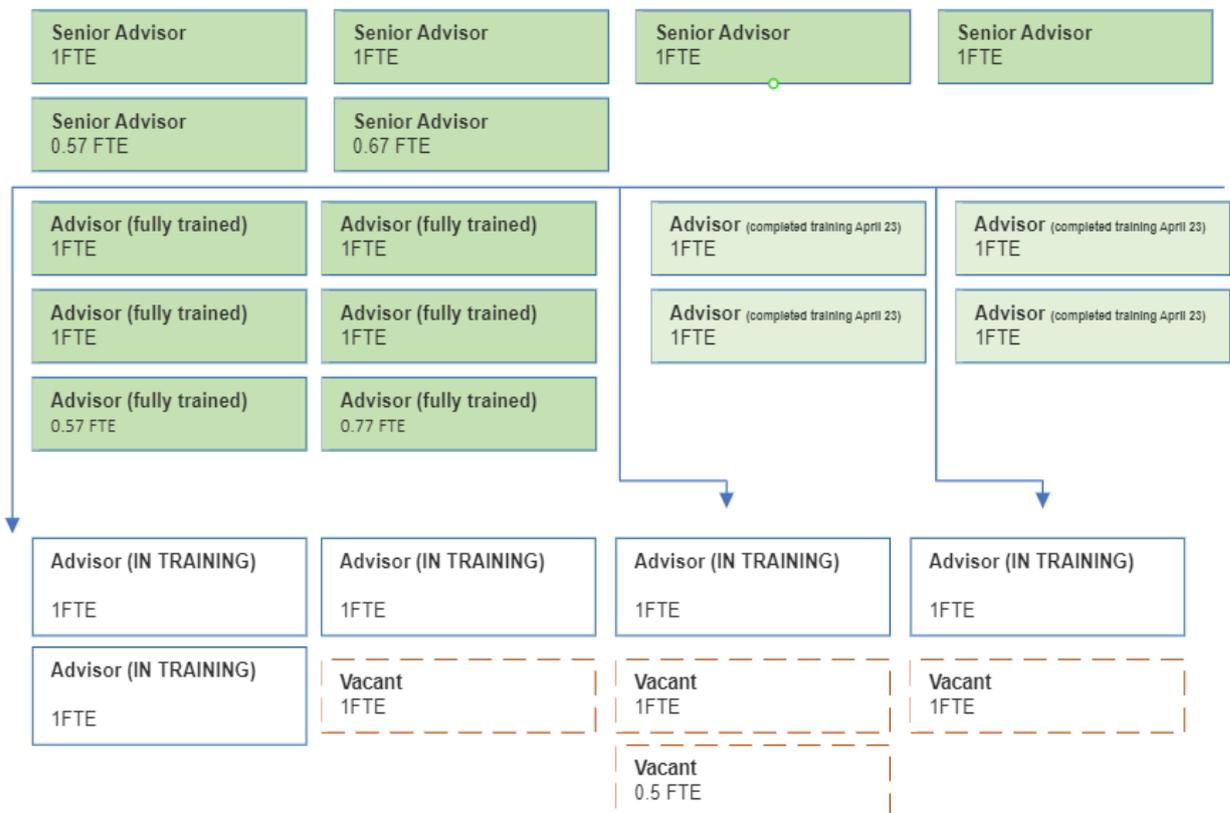
## Appendix 2 – Current Availability of Customer Services by Location

Customer Services teams are based at the following locations, call handling and managing face-to-face appointments.

<b>Location</b>	<b>Days Available</b>
Ayr – The Wallace Tower	Tuesdays to Fridays 09.00-16.45 (16.00 on Fridays)
Troon – Municipal Buildings	Tuesdays 09-00 – 16.45
Prestwick – Freemans Hall	Wednesdays 09.00 - 16.45
Girvan – Carrick Opportunities Centre	Thursdays 09.00 – 16.45
Maybole – 172-176 High Street	Fridays 09.00 – 16.00

### Appendix 3 – Staffing Establishment

The graphic below shows the current staffing establishment in Customer Services, highlighting those posts where advisors are not yet fully trained, or where recruitment to vacant posts is ongoing. Significant turnover in 2022/23 has resulted in 37% of advisors (including senior advisors and advisors) as at 4<sup>th</sup> May 2023, having less than 12 months' service and therefore not yet fully trained. This means they cannot handle to full range of enquiries. At earlier points in 2022/23, 45% of the team were not fully trained, placing extreme pressure on the 55% who were.



## Appendix 4(i) Customer Survey Findings

This survey ran from 1st March to 30th April 2021 during Covid restrictions. Customers could complete the survey online or by calling 0300 123 0900. The survey was actively promoted to customers calling our contact centre. 466 people took part.

The survey asked customers to rate the service and to tell us how they would like to access customer services going forward.

### How customers rate our current service

**98%**



of customers rated the service they got from our Customer Services Team as 5 stars

**97%**

of customers said that the length of their enquiry time was "just right"



### How customers would prefer to access Customer Services in future

**81.5%** prefer to handle their enquiry by phone.

6.5% of customers would prefer to make contact by e-mail



2% of customers would prefer to make contact via Live Web Chat



10% of customers would prefer to make contact face to face on a drop or appointment in basis

# Reintroducing face to face customer services

## Public Consultation Outcomes

The survey was designed to get feedback from residents, including those who previously used the face-to-face drop in service from the Customer Service Centres. The survey asked respondents about their previous ways of interacting with the council and their preferences going forward. The survey ran from 1 November to 31 December 2021. Residents could complete the survey online, by calling our Customer Services Team or by asking at their local library or leisure centre. The survey was advertised on our social media channels; on local radio; in paper copies of South Ayrshire Council Live and by our Customer Services and other frontline, customer-focussed teams.

354 responses were received.



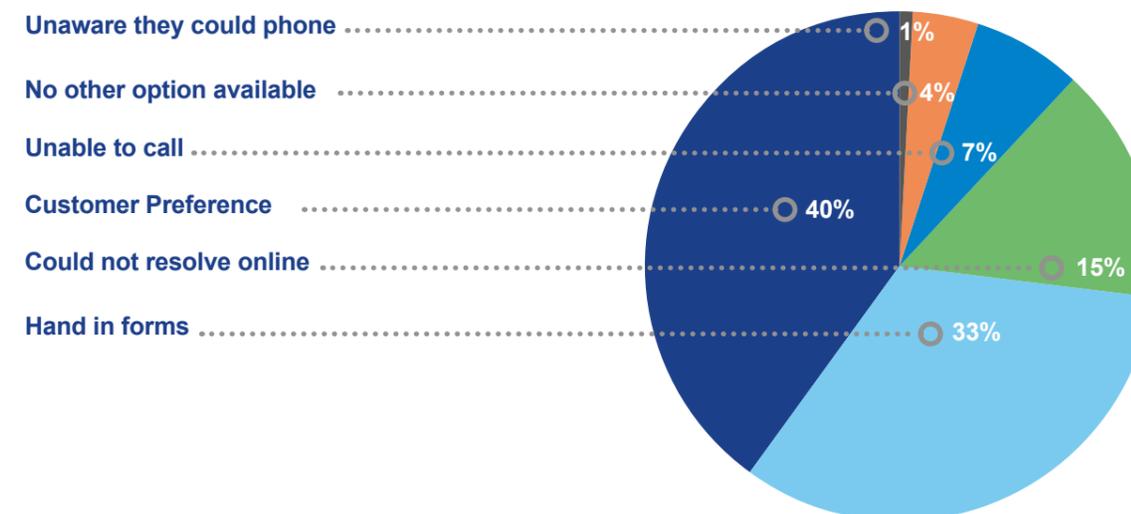
## Reintroducing face to face customer services – Public Consultation Outcomes

We know that customer trends have changed since March 2020, with more and more customers accessing services by phone and online. We also know that for a small number of people phone and digital isn't an option. We are looking at how we might reintroduce face to face customer services and asked our customers, particularly those who dropped into our Customer Service Centres, how they contacted us previously, and how they would like to access our services going forward. This is what they told us.

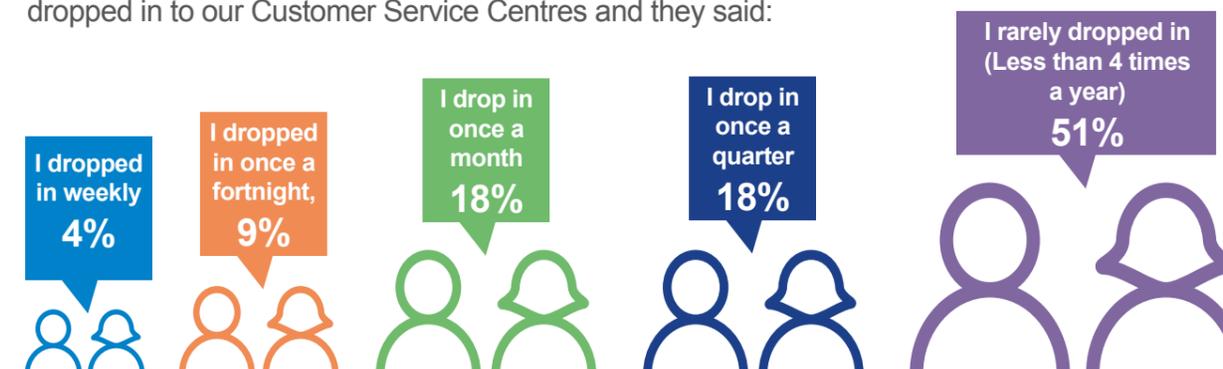
### Before covid restrictions began in March 2020

 **70%** of our customers had dropped in to a Customer Service Centre.

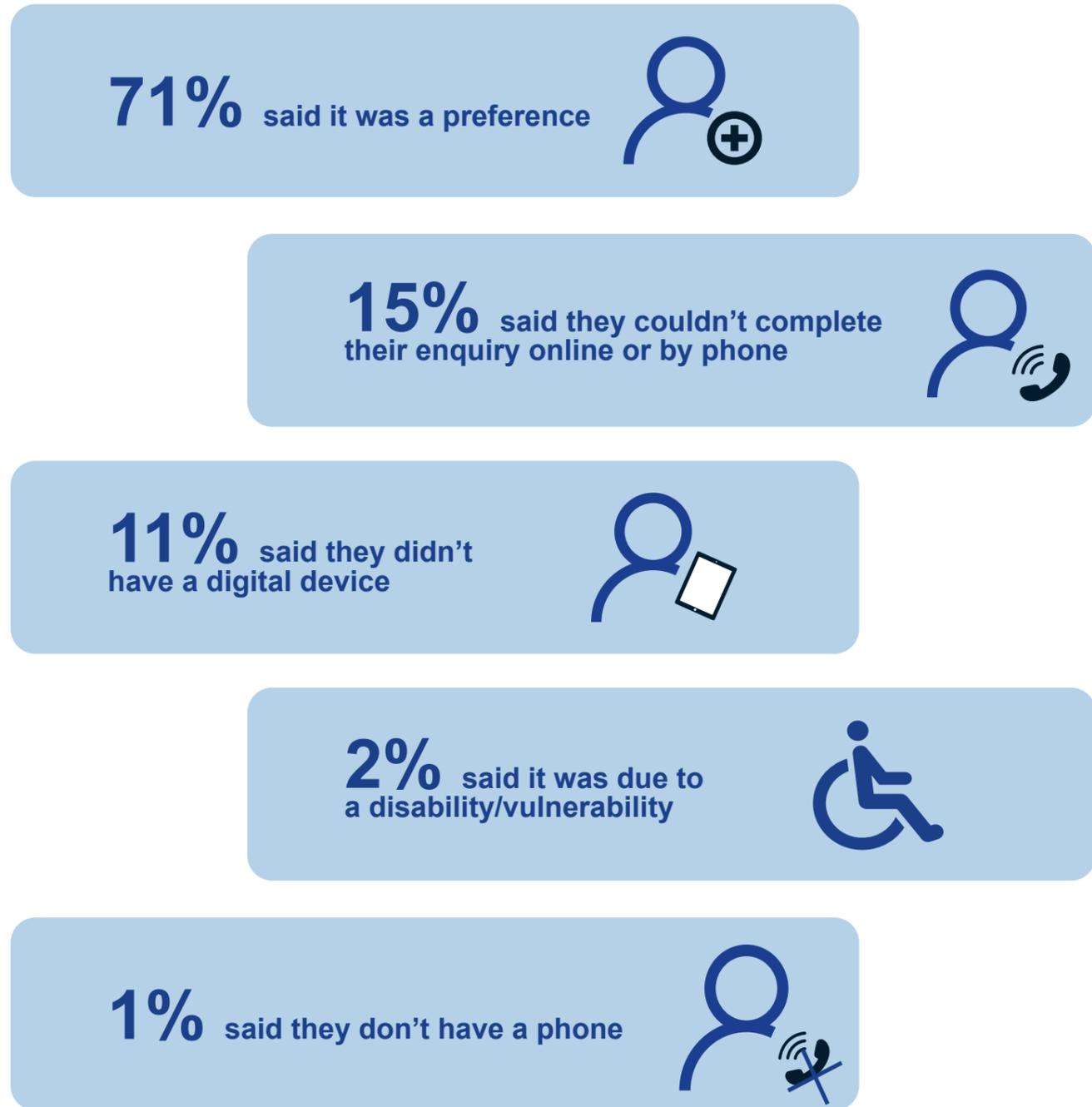
The reasons they dropped in were:



We wanted to know more about how **often** our customers dropped in to our Customer Service Centres and they said:



We wanted to know more about why our customers who had previously dropped in to Customer Service Centre chose to speak with us face to face:



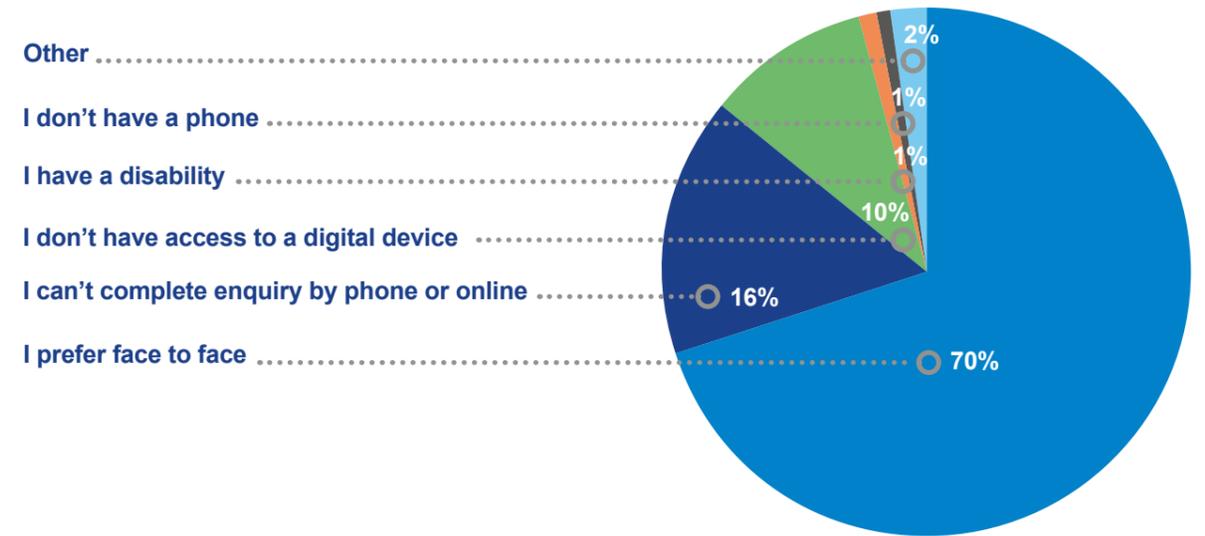
### The Future

We asked our customers how they would like to access our services in the future. This is what they told us.



We were interested to find out why **32%** of our customers would prefer to contact us in person.

This is what they said:



We were also interested to hear what other ways our customers would like to communicate with us and 35% of people said they would like to use other digital channels.



This information can be made available, on request, in braille, large print or audio formats and can be translated into a range of languages. Contact details are provided below.

درخواست کرنے پر یہ معلومات ناپینا افراد کے لئے ابھرے حروف، بڑے حروف یا آڈیو میں مہیا کی جاسکتی ہے اور اسکا مختلف زبانوں میں ترجمہ بھی کیا جاسکتا ہے۔ رابطہ کی تفصیلات نیچے فراہم کی گئی ہیں۔

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ਇਹ ਜਾਣਕਾਰੀ ਮੰਗ ਕੇ ਬੋਲ, ਵੱਡੇ ਅੱਖਰਾਂ ਅਤੇ ਸਣਨ ਵਾਲੇ ਰਪ ਵਿਚ ਵੀ ਲਈ ਜਾ ਸਕਦੀ ਹੈ, ਅਤੇ ਇਹਦਾ ਤਰਜਮਾ ਹੋਰ ਬੋਲੀਆਂ ਵਿਚ ਵੀ ਕਰਵਾਇਆ ਜਾ ਸਕਦਾ ਹੈ। ਸੰਪਰਕ ਕਰਨ ਲਈ ਜਾਣਕਾਰੀ ਹੇਠਾਂ ਦਿੱਤੀ ਗਈ ਹੈ।

Niniejsze informacje mogą zostać udostępnione na życzenie, w alfabecie Braille'a, w druku powiększonym lub w formacie audio oraz mogą zostać przetłumaczone na wiele języków obcych. Dane kontaktowe znajdują się poniżej.

Faodar am fiosrachadh seo fhaighinn, le iarrtas, ann am braille, clò mòr no clàr fuaim agus tha e comasach eadar-theangachadh gu grunn chànanan. Tha fiosrachadh gu h-ìosal mu bhith a' cur fios a-steach.

**South Ayrshire Council**  
**Contact Centre**  
**0300123 0900**

# Reintroducing face to face customer services

## Public Consultation Outcomes



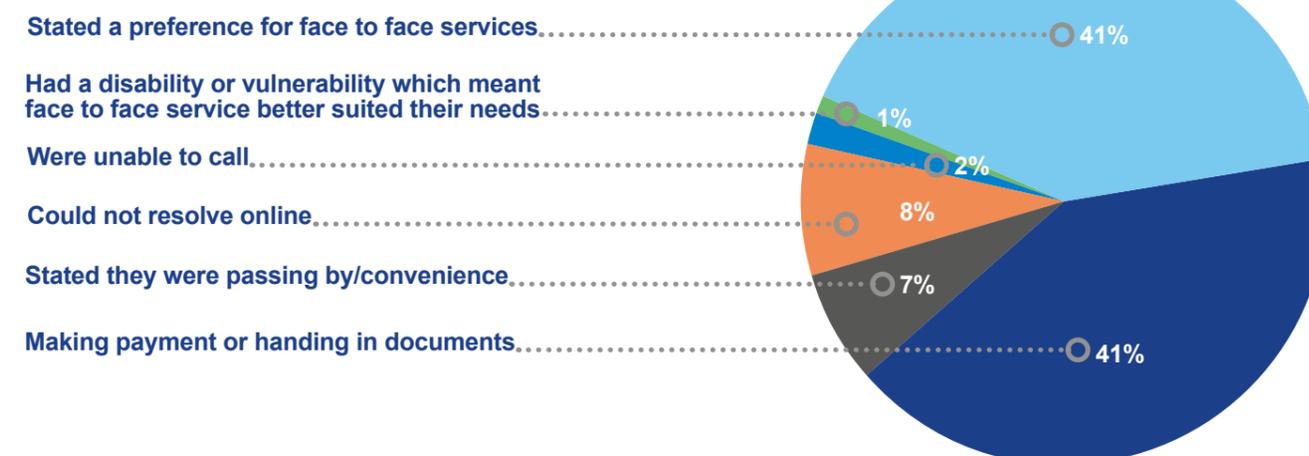
## Reintroducing face to face customer services – Public Consultation Outcomes

This consultation was targeted at customers who use face-to-face services across South Ayrshire, ensuring copies were available in our libraries, leisure centres, and golf courses, through Thriving Communities and Customer Services. The survey was paper based to reach a non-digital customer base. The survey ran from 8th July to 5th August 2022.

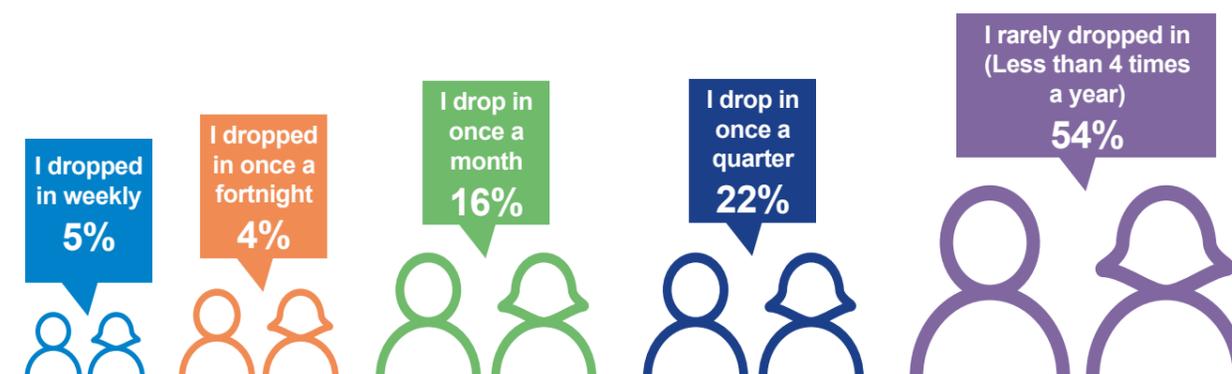
### Before covid restrictions in March 2020

We asked respondents for the reasons they had dropped into a customer services centre.

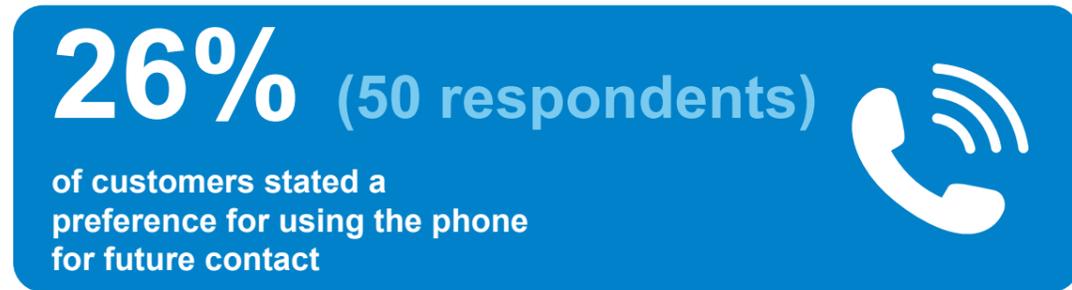
The reasons they dropped in were:



We wanted to know more about how **often** our respondents dropped in to our Customer Service Centres and they said:



We wanted to know more about the 193 respondents who had previously dropped into our centres pre covid and their preferences for contacting us in the future this is what they told us:



Of the 55% (106) respondents who indicated face to face was their favoured option for contacting the service, they provided the following reasons:



**Comments**

Some of the additional comments made by our respondents are displayed below:

*"Use an appointment system or have drop in slots available as not everyone finds it easy to use online/phone"*

*"Only dropped in to set up council tax as I didn't know I could do it online. I have never needed to visit since"*

*"even if days/hours are restricted, it is important that they are available at least a few half days a week"*

*"Sometimes phone/email/online forms just do not give you the answers. The facility doesn't have to be open all the time and can have restricted hours, but at least there is a person to help you - some people do not have access, as you well know. Hours of opening have to be advertised well"*

*"I think it's important to have the option of face to face enquiries for people who are unable to access online services either through lack of connectivity or because of a learning difficulty. Without face to face these people are forgotten and marginalised"*

*"Haven't missed the centre being closed in lockdown and haven't had any chance to go in since re-opened"*



This information can be made available, on request, in braille, large print or audio formats and can be translated into a range of languages. Contact details are provided below.

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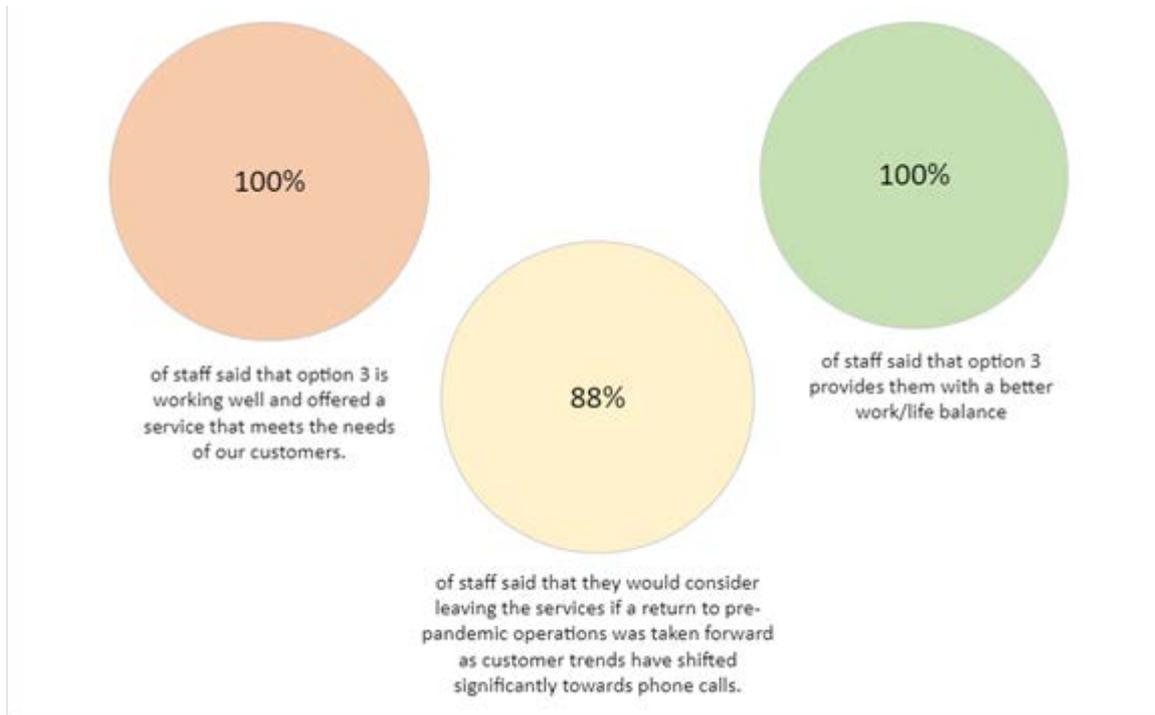
Niniejsze informacje mogą zostać udostępnione na życzenie, w alfabecie Braille'a, w druku powiększonym lub w formacie audio oraz mogą zostać przetłumaczone na wiele języków obcych. Dane kontaktowe znajdują się poniżej.

Faodar am fiosrachadh seo fhaighinn, le iarrtas, ann am braille, clò mòr no clàr fuaim agus tha e comasach eadar-theangachadh gu grunn chànanan. Tha fiosrachadh gu h-ìosal mu bhith a' cur fios a-steach.

**South Ayrshire Council**  
**Contact Centre**  
**0300123 0900**

## Appendix 5 – Feedback from staff on proposals

The staff group participated in a range of workshops, focus groups and surveys to develop options and recommendations for the future operation of the service. The most recent staff survey took place in **April 2023**. Feedback from staff was as follows:



### Comments received were as follows:

*“I feel the service needs have evolved since we were last face-to-face and I believe we have been responsive to those changes”*

*“Continuing with the current model makes the most sense both operationally & financially - most of our enquiries are via 0300 & the present operating model allows us to deliver the best possible service to customers”*

*“If any staff rely on public transport for any of the centres, transport services have also changed, i.e. not as often, so staff may have difficulties getting to and from work on time etc”*

*“I feel that the way we are working works very well for staff and customers as we provide phone service, phone appointments and face-to-face appointments. Due to the volume of calls this would be very difficult to go back to the pre-covid way”*

*“It would seem like a frustrating step backwards for the Council and CS and would put us at odds with a) how other Councils/businesses are adapting to cuts in public funding/cost of living crisis & b) how these organizations are embracing new technology. We would be going 'back in time!'”*

*“Service would not cope with centres opening pre-covid with the volume of calls/phone enquiry lengths The service would suffer considerably and think*

*telephone appointments and other services we are able to provide now would need to be looked at/would no longer be manageable”*

*“Option 1 = Increased pressure and costs. Less productivity. Feel it is unnecessary for the service and would be detrimental on the whole”*

An earlier staff survey in **July/ August 2022** found that



Some of the reasons given are as per the comments below:

*“I feel the current model (option 3) works very well. We are available to deal with any face-to-face customers who need us while managing to sustain our phone lines which have become a lot busier”*

*“Contact centre only option is not sufficient for all citizens, we would miss vulnerable customers. The current arrangement works”*

*“I feel if we go back to pre-pandemic way of working it will have a very negative effect on our staff and service, we answer around 1000 calls a day and we would never be able to do that plus serve drop in face to face”*

*“I really enjoy my role in Customer Services but recent pressures and very high call volumes make it unsustainable to go back to pre-pandemic ways of working without having more staff.”*

*“Customers are used to doing a lot online and via telephone now and I do not think there would be enough customers coming in and out of the office to justify staff members there 5 days a week. If I have to start travelling every day with fuel costs this could affect my household income”*

*“Option 1 does not seem to make sense from a service/cost point of view. Drop-in would force the service back into many unnecessary visits e.g. printing off bin calendars. The upheaval and strain on call handlers would force a lot of experienced advisors to go elsewhere and CS are already suffering as a result of this”*

**South Ayrshire Council**  
**Equality Impact Assessment including Fairer Scotland Duty**

**Section One: Policy Details\***

Name of Policy	Customer Services Future Operating Model Proposals
Lead Officer (Name/Position)	Jane Bradley, Director – Strategic Change and Communities
Support Team (Names/Positions) including Critical Friend	Gillian Farrell, Service Lead, OD and Customer Services Michelle Piper, Customer Services Officer James Andrew – Organisational Development Coordinator (Critical Friend)

\*The term Policy is used throughout the assessment to embrace the full range of policies, procedures, strategies, projects, applications for funding or financial decisions.

What are the main <b>aims</b> of the policy?	<ul style="list-style-type: none"> <li>• To gain agreement for the future operating model of frontline Customer Services.</li> <li>• To allow customers to access customer services in a range of ways and to support people who have a 'barrier' to accessing services other than by face-to-face, including those who are digitally excluded, financially unable to use other methods of contact or who have a disability or other factor which makes face-to-face contact the most appropriate means of interacting with the council.</li> <li>• To support staff wellbeing and to support them to be engaged and productive at work</li> <li>• To provide services which represent best value</li> </ul> <p>The report recommends Option 3 - Provision of Customer Services by phone, online and face-to-face by appointment. This is the most efficient and effective way of running the service, offering customers phone, digital and face-to-face customer services. This option reflects customer trends, demand and feedback; is achievable within existing staffing levels; is cost-neutral and reflects feedback from staff</p>
What are the intended <b>outcomes</b> of the policy?	Customers can access Customer Services in a range of ways. While people will be encouraged to use more efficient means of contact, such as digital, phone and phone appointments, face-to-face services will also be available by appointment in each of the five towns. Customers who require a face-to-face customer enquiry will be able to arrange an appointment by calling or by asking for a referral at a public-facing council office.

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**Section Two: What are the Likely Impacts of the Policy?**

Will the policy impact upon the whole population of South Ayrshire and/or particular groups within the population? (please specify)	Residents who access customer services Staff who work in Customer Services.
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**Considering the following Protected Characteristics and themes, what likely impacts or issues does the policy have for the group or community?**

**List any likely positive and/or negative impacts.**

<b>Protected Characteristics</b>	<b>Positive and/or Negative Impacts</b>
<b>Age:</b> Issues relating to different age groups e.g. older people or children and young people	<p>Anticipated positive impact as the recommended option provides access to Customer Services by phone, phone appointment, digitally and face-to-face by appointment.</p> <p>We do not hold data on the protected characteristics of people who use Customer Services, however the demographic of South Ayrshire indicates a higher and increasing % of older people compared with the national average.</p> <p>Some older people may have barriers (e.g. barriers to digital or phone access) which mean that a face-to-face service may better suit their needs. This option enables residents to access face-to-face customer services by appointment.</p> <p><i>Removal of a face-to-face option could detrimentally impact on this group and is therefore not a recommended option.</i></p>
<b>Disability:</b> Issues relating to disabled people	<p>Anticipated positive impact as the recommended option includes a wide range of access to the service – phone; phone appointment; digital and face-to-face by appointment</p> <p>We do not hold data on the protected characteristics customers. Some people with disabilities may have barriers which mean that a wide range of access options could better meet specific needs. When surveyed, some customers commented that a face-to-face service would be required because of a disability and this option offers a face-to-face appointment service.</p>

	<p>Reasonable adjustments are made where required for customers and staff with disabilities.</p> <p><i>Removal of a face-to-face option could detrimentally impact on this group and is therefore not a recommended option.</i></p>
<b>Gender Reassignment – Trans/Transgender:</b> Issues relating to people who have proposed, started or completed a process to change his or her sex	No anticipated impact.
<b>Marriage and Civil Partnership:</b> Issues relating to people who are married or are in a civil partnership	No anticipated impact.
<b>Pregnancy and Maternity:</b> Issues relating to woman who are pregnant and/or on maternity leave	No anticipated impact.
<b>Race:</b> Issues relating to people from different racial groups, (BME) ethnic minorities, including Gypsy/Travellers	No anticipated impact.
<b>Religion or Belief:</b> Issues relating to a person's religion or belief (including non-belief)	No anticipated impact.
<b>Sex:</b> Gender identity: Issues specific to women and men/or girls and boys	No anticipated impact.
<b>Sexual Orientation:</b> Issues relating to a person's sexual orientation i.e. LGBT+, heterosexual/straight	No anticipated impact.

<b>Equality and Diversity Themes Relevant to South Ayrshire Council</b>	<b>Positive and/or Negative Impacts</b>
<b>Health</b> Issues and impacts affecting people's health	Anticipated positive impact on staff health and wellbeing. Staff surveys told us that the recommended option gave them a better work-life balance and alleviates pressure of work by managing face-to-face enquiries by appointment. Feedback from staff was that a return to a drop-in service would not be viable in terms of customer trends and demand and would unnecessarily impact on pressure of work.
<b>Human Rights:</b> Issues and impacts affecting people's human rights such as	No anticipated impact

being treated with dignity and respect, the right to education, the right to respect for private and family life, and the right to free elections.	
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<b>Socio-Economic Disadvantage</b>	<b>Positive and/or Negative Impacts</b>
<b>Low Income/Income Poverty:</b> Issues: cannot afford to maintain regular payments such as bills, food and clothing.	<p>Positive Impact – Customers will be able to access customer services in a range of ways. Phone call backs will be available for those who cannot travel to a centre or prefer a phone service.</p> <p>The increasing cost of fuel and the cost-of-living crisis is impacting on a wider percentage of the population and this proposal minimises the need for customers or staff to incur travel costs. Where staff cannot work on a hybrid basis from home, alternative arrangements will be made as per existing HR policies.</p>
<b>Low and/or no wealth:</b> Issues: enough money to meet basic living costs and pay bills but have no savings to deal with any unexpected spends and no provision for the future	<p>Positive Impact – Customers will be able to access customer services in a range of ways. Phone call backs will be available for those who cannot travel to a centre or prefer a phone service. Feedback from staff survey is that the recommended option minimises travel to work costs as it involves a hybrid working model. Staff indicated that any return to a 5 day a week face-to-face service would likely have a negative impact on their household finances due to increased travel costs</p>
<b>Material Deprivation:</b> Issues: being unable to access basic goods and services i.e. financial products like life insurance, repair/replace broken electrical goods, warm home, leisure/hobbies	<p>Positive Impact – Customers will be able to access customer services in a range of ways. Phone call backs will be available for those who cannot travel to a centre or prefer a phone service.</p>
<b>Area Deprivation:</b> Issues: where you live (rural areas), where you work (accessibility of transport)	<p>Positive Impact – Customers will be able to access Customer Services in a range of ways. Locations for face-to-face appointments are central and accessible by public transport. This model meets the access needs of all customers as indicated by customer feedback and trends. Customers will be able to access the service in a way that meets their needs i.e. by face-to-face appointment by phoning, emailing or visiting the Customer Services team as per the locations outlined in Appendix 2. On occasion, some customers ask about a customer service from their nearest public facing council office. Going forward, a simple referral form will be made available at public facing buildings, meaning staff in these areas, if presented with an ad hoc customer enquiry, can forward the customer's name and contact details to Customer Services, who will thereafter contact the customer to manage their enquiry or arrange an appointment as necessary. Where a customer is particularly vulnerable or is in an emergency situation, staff at public locations will be given a direct line to</p>

	customer service supervisors, who will deal with the enquiry. Staff at these locations will not handle customer service enquiries.
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### Section Three: Evidence Used in Developing the Policy

<p><b>Involvement and Consultation</b> In assessing the impact(s) set out above what evidence has been collected from involvement, engagement or consultation? <b>Who</b> did you involve, <b>when</b> and <b>how</b>?</p>	Staff engagement within Customer Services team, including focus groups and meetings (series of events 2020-2023) workshops (2022/23) staff surveys (appendix 5 of report) and 3 customer surveys, as detailed in appendix 4 of the report, helped to inform these proposals.
<p><b>Data and Research</b> In assessing the impact set out above what evidence has been collected from research or other data. Please specify <b>what</b> research was carried out or data collected, <b>when</b> and <b>how</b> this was done.</p>	Data on numbers of face-to-face customer appointments over last 9-12 months; Comparative data on customer trends, analysing customer trends since 2018/19. This data was taken from the Netcall, email and Q-tastic systems.
<p><b>Partners data and research</b> In assessing the impact(s) set out in Section 2 what evidence has been provided by partners?  Please specify partners</p>	
<p><b>Gaps and Uncertainties</b> Have you identified any gaps or uncertainties in your understanding of the issues or impacts that need to be explored further?</p>	

### Section Four: Detailed Action Plan to address identified gaps in:

- a) evidence and
- b) to mitigate negative impacts

No.	Action	Responsible Officer(s)	Timescale
1			
2			
3			

**Note: Please add more rows as required.**

### Section Five - Performance monitoring and reporting

Considering the policy as a whole, including its equality and diversity implications:

When is the policy intended to come into effect?	From July 2023 (in line with the budget setting process)
When will the policy be reviewed?	July 2024 in line with service plan activity.
Which Panel will have oversight of the policy?	



**Section 6**

**South Ayrshire Council**

**Appendix .....**

**Summary Equality Impact Assessment Implications & Mitigating Actions**

**Name of Policy:**

This policy will assist or inhibit the Council’s ability to eliminate discrimination; advance equality of opportunity; and foster good relations as follows:

<b>Eliminate discrimination</b>  The recommended option provides a range of ways for customers to contact us and includes phone, digital and face-to-face options. This ensures the service is accessible to all.
<b>Advance equality of opportunity</b>
<b>Foster good relations</b>
<b>Consider Socio-Economic Disadvantage (Fairer Scotland Duty)</b>  The recommended option has been designed to support customers who are socio-economically disadvantaged to access services, including the ability to receive a face-to-face service by appointment; a phone (including call back appointment service) or digitally as appropriate.

<b>Summary of Key Action to Mitigate Negative Impacts</b>	
<b>Actions</b>	<b>Timescale</b>

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**Signed: .Gillian Farrell .....Service Lead OD & Customer Services.**

**Date: May 2023**