

Strategy refresh process

Summary

As part of its annual service plan review, the Anglia Revenues Partnership has reviewed its strategic priorities. From a series of discussions and reviews, ARP is proposing a new statement of its mission, revised priorities, and a new vision for its service offer.

As an integral component in each of its partners' strategies, extensive work has taken place into finding common threads in those strategies and building suitable priorities.

Background

In September 2017, Joint Committee adopted a set of five strategic priorities to guide the work and development of Anglia Revenues Partnership. These are as follows:

Priority 1 Core purpose	At the heart of ARP's role is the maximising of council tax and business rates income streams on behalf of partner councils.
Priority 2 Relationships	ARP acts as a trusted adviser on Council Tax, Business Rates and benefits issues for partner councils (having regard to its core purpose).
Priority 3 Partner service standards and operating costs	ARP's prime focus is a level of service to its Councils that means partner Councils are high performing in regard to revenue. ARP ensures its operating costs are kept within budget and uses opportunities to earn income to balance ARP's budget and deliver a return to partner Councils.
Priority 4 Customer service standards	ARP's business and resident customers should experience a good level of service in accordance with agreed service standards.
Priority 5 Commercialisation	ARP continues to expand its commercial operations through a controlled risk assured and risk assessed approach. Options for delivery include extending the partnership, trading agreements or the provision of specialist services through delegated agreements as well as delivering services through ARP Trading Ltd.

Operating Model workshop

ARP is redesigning its operating model, and as part of this process the management team held a workshop to discuss the partnership's value propositions and the operating elements surrounding these. All this work needs to be informed by the partnership's strategy, so we took the opportunity to review the 2017 priorities.

The team came up with a number of ideas to improve, and plug gaps in, the strategic framework.

Approach

In a brief session at the start of the workshop, four teams reviewed the existing strategic priorities, and then fed back into a group discussion. The notes of these discussions are below, put into themes by the pictogram bullet points.

Blue table

- Priority 1 needs to speak about timely award of benefits, not just revenues.
- The part about best advice to businesses (1e) should move to 'Stakeholders' (see below).
- 'People and organisational development' should be a new Priority 2.
- 'Customer service standards' should merge with 'Relationships' to form a new Priority 3 'Stakeholders'.
- 'Partner service standard and operating costs' should be Priority 4.
- Needs more about relationships with other service areas.
- Fraud needs to be in Priority 5.

Green table

- Benefits not in core purpose?
- No mention of staff?
- Priority 4 should be about digital innovation instead of CS standards.
- Good quality digital offering
- Commercialisation shouldn't detract from core service offering.
- Agility, resilience, efficiency
- Low cost
- Quality automation
- Challenge [status quo]

Yellow table

- Benefits needs to be part of core purpose
- Second priority should be Relationships and Customer Services.
- Expand core purpose – support vulnerable residents
- Support people who can't as distinct from people who won't pay.
- Standard, modern services, efficient and excellent.

Pink table

- Core purpose should include Benefits.
- No mention of staff including taking pride. People should be Priority 2.
- Signposting to discounts, exemptions and benefits as part of core purpose.
- Develop punchy mission statement.
- Fair debt collection, recovery and enforcement. Be mindful how we collect.
- Internal teams' relationships. Relationships with others e.g. VOA. Stakeholder relationships.
- Self Service and automation technology – Work with suppliers on further digitisation.
- Differences – 'EoS' – Encourage equalisation of service provision across the partnership.
- Include protection of public purse

Summary findings from discussion

All tables

- Benefits is missing from ARP's strategic priorities and needs to be included.

Most tables

- People and organisational development should be a high priority. Two tables said independently that these topics should become priority 2.
- Relationships (currently priority 2) should be broader than 'policy' and 'advice' links. This should encompass internal operational links, including customer service teams, as well as external links with other agencies and organisations (e.g. DWP, VOA, CAB etc).
- We need to continue developing a high-quality digital offer, with Self Service and automation by default.
- One table made explicit mention of the need for a mission statement in their feedback, this was a discussion point for every group.

Other notable mentions

- Supporting vulnerable people, along with mindfulness and fairness in the way we follow up and collect debts, is mentioned by two tables.
- We need to standardise across sites and partners towards a single way of working (two tables).
- Efficiency is mentioned by two tables.
- We need to continue being cost conscious in protecting public funds (two tables).
- Commercialisation strategy needs to complement and not detract from the core service, and needs to include the Fraud Team.

Further work by the strategic management team

Following the operating model workshop, our strategic management team suggested a set of four, prioritised strategic themes. These are, with an indication of which pictogram topics they speak to:

- **Customer access**
- **Staff (organisation, structure, location)**
- **ICT infrastructure and suppliers**
- **Commercial** and ► **financial**

Beyond these headings, we need to make sure our strategy speaks about (a) our benefits work ◆, (b) relationships ◐ and (c) consistent, efficient, agile, resilient working practices across the partnership ◻.

Partner strategies

ARP is integral to each partner's overall service offer. Each partner prepares and publishes its own strategy documents, so any partnership-wide strategy needs to align with and complement these multiple frameworks.

We reviewed partner strategies for excerpts directly relevant to ARP, then organised these into some themes emerging from discussions so far, to make sure any revised strategy speaks to each partner's corporate priorities.

Appendix B to the Strategy Refresh report to December 2019 joint committee gives a detailed, tabulated summary of these findings.

Summary observations

Clear threads can be drawn between the corporate priorities of all or most partners, for example on the topics of economy, environment, communities, and financial management. Some priorities are particular to single partners at this level, such as housing, transport and digital transformation.

We found the following shared themes:

Shared working: All partners are committed to shared working, with budgetary projections relying in large part on operations that pool resources and unify mutual processes and requirements.

Customer access: We all share similar commitments to convenient, customer-centric ways of working, with the same standards applied across the partnership.

People: Three of our four employing partners state their people priorities in their leading strategic policy documents. The leading common thread relates to equipping people with the correct skills. Breaking down silos, responsiveness to change and health and wellbeing.

Technology: We are all working towards more technologically enabled ways of working, with customer convenience at their core. We also touch on use of data to direct plans and use of technology to release our teams to focus on people with more detailed needs.

Economic development: Our rates section can help each partner's economic development priorities and improve efficiencies and collection rates to yield more from rates retention schemes.

Commercial and financial: We all want to improve our commercial approach and leverage more from our operations. We also seek increased financial efficiencies through streamlining processes and from return on investment. We want to deliver maximum value to people who need our support, for example by expending our discretionary housing payment budgets fully.

Strategy Sessions

In late October 2019, we ran around a dozen workshop strategy sessions with the ARP and wider customer services team across all four APR sites, in order gather feedback and ideas to incorporate into the strategy and its subsequent plans. These were vibrant, useful events where much valuable evidence and contributions were gathered.

Broadly speaking, the discussions fell into five broad categories:

1. Emphasise customers are our top priority - especially help for vulnerable people not digitally capable
2. Recognise the importance of the team across ARP, and how critical the team is to delivering against any strategy.
3. Poor digital systems, internal business systems, online forms, slow responses from suppliers
4. Need to improve team communications across the four sites to foster single team ethos
5. Still have work to do to harmonise all procedures in all disciplines
6. Striking right speed/accuracy balance & avoiding double handling