**SPECIFICATION OF REQUIREMENTS FOR THE**

**PROCUREMENT OF A PERFORMANCE MONITORING AND CUSTOMER FEEDBACK SYSTEM AT THE ROYAL BOROUGH OF KENSINGTON AND CHELSEA**

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**1. INTRODUCTION**

The Customer Access Department at the Royal Borough of Kensington and Chelsea (RBKC) will be procuring a system which will meet requirements relating to the monitoring of staff and service performance, and feedback of all nature provided by the Council’s customers.

The department is looking to continue to make service improvements while retaining the need for a pragmatic and configurable feedback process which provides greater accountability and easily accessible behavioural insight. In order to do this the department requires a solution which can provide the real time monitoring and analysis of both the experiences of our customers and the operational performance of our staff across our business.

**2. BACKGROUND**

In 2015 Customer Services and Revenues and Benefits merged to form the Customer Access Department. The department has 250 staff providing customer contact for over 22 back office services, and provides a front-line service to the public.

The Customer Access Department is comprised of Customer Services, Council Tax, Housing Benefits and Business Rates.

The Council Tax and Benefits service manages the collection of Council Tax for 88,500 rate-paying households in the Royal Borough. The Council Tax collection rate in 2016/17 was 97%.

The Benefits team have a caseload of approximately 222,000 per year. The team is one of the most successful in the country with a turnaround of twelve days for new claims, and five days for changes in circumstances.

Customer Services includes a face-to-face Customer Service Centre (CSC); a Contact Centre (CC), handling calls and emails; accessible transport services and postal processing functions. The CSC handles 170,000 visits per year and the CC receives 400,000 calls (plus 160,000 via switchboard) and 40,000 emails. Customer Services provides front-line services for council functions including environmental health, waste services, enforcement, planning, parking, adult social care, and housing. There are four quantitative key performance indicators that Customer Services is required to meet. These are:

* 85% of customers seen at the CSC within 20 minutes
* 90% of calls to the CC answered
* 80% of calls to the CC answered within 30 seconds

There are four qualitative key performance indicators that Customer Services is required to meet. These are:

* 80% of customers rating the service they have received in the CSC as good
* 95% of customers who rate the CSC service as right first time
* 92% of customers rating the service they have received in the CC as good
* 90% of customers who rate the CC service as right first time

The Customer Service function has had customer feedback in place for some time. The end of the current contract for this has provided an opportunity to take a wider view across the department to explore how performance and feedback data can be more consistently aligned. This would also provide the means to identify trends and to develop true insight on service performance.

Table 1. Volumes of calls taken by the Contact Centre between November 2016-February 2017

(Excludes calls taken by Switchboard)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Month** | **Internal** | **Landline** | **Mobile** | **Withheld** |
| Nov 2016 | 718 | 12062 | 15815 | 2522 |
| Dec 2016 | 495 | 9247 | 12714 | 1944 |
| Jan 2017 | 532 | 11793 | 15619 | 2352 |
| Feb 2017 | 571 | 10768 | 15238 | 2234 |
| **Average** | **579** | **10968** | **14847** | **2263** |
| **Percentage** | **2%** | **38%** | **52%** | **8%** |

**3. SCOPE AND OBJECTIVES**

The Royal Borough of Kensington and Chelsea is looking for a suitably qualified organisation to supply a Performance Monitoring and Customer Feedback System (PMCFS) to be deployed on a single site (Kensington Town Hall).

The solution should meet a number of high-level requirements, including:

* Capture data and show trends/performance over time at an individual level.
* Provide an efficient and effective means of collecting feedback data across all channels (face to face, calls, web, email).
* Provide a simple method to collect complaint data and case manage this data in accordance with the Council’s three-stage process. ([RBKC three-stage complaints process](https://www.rbkc.gov.uk/council/comments-complaints-feedback/how-do-i-complain)).
* Provide the means to view feedback (including complaints) data alongside performance data and provide a view of trends and performance over time at service level.
* Provide the means to have coaching performance records for staff.
* Ability to set up dashboards and schedule reports to be sent to members of staff.

The contract being awarded is for the supply, implementation and maintenance of an automated and integrated system package, providing extensive performance monitoring capabilities and a comprehensive customer feedback process. The functional specification below provides detailed requirements for the software, hardware, the implementation, and the support services to be supplied. The contract will be awarded for five years.

The system should provide a streamlined process which is adaptable to future business needs; it should allow for flexibility in deployment with an emphasis on immediacy regarding the application of system upgrades and updates.

Suppliers are requested to detail, with reference to the specification, how they will implement the PMCFS and services required, together with a timeline for each stage of implementation. It is anticipated that the prioritisation of delivery will be as follows:

* Feedback (phone and face to face)
* Contact quality assessments/records
* Integration of performance data
* Complaints
* Behavioural insights
* Feedback (web)

Full and clear notice should also be provided of what assistance and resources are required from the Council in order to have the system up and running. A project plan should be provided outlining the full implementation process including a go live date.

**4. SYSTEM SPECIFICATION**

See attached spreadsheet.

**5. COMPLIANCE REQUIREMENTS**

Providers should provide a solution which is fully compatible with the following Council requirements.

Windows 7 Professional systems are currently used across the Council. Any PC-based hardware supplied as part of the tender is expected to comprise standard components. Any computer provided that is to be connected to a network should be capable of running anti -virus software of the Council’s choice.

The system provided should be e-GIF (V4) compliant. Where appropriate the British Standards BS7666 2.0 and BS8766 2.0 (or any European or International equivalent) must be adhered to:

Adherence to e-GIF standards and policies is mandatory in all new systems, and all systems that interface with UKOnline, the Government Gateway, Government Secure Internet (GSI) and the Knowledge Network. Compliance with e-GIF is recommended in all public sector procurements and major upgrades to legacy systems.

BS7666 is the UK standard for defining the location of property and places. BS8766 is a draft UK standard for defining the names of people. XML is the accepted international open standard for data exchange and is incorporated into e-GIF schemas.

# RBKC ICT Infrastructure Overview:

Authentication:

Kerberos over a Windows 2008 R2 Domain.

Servers:

Preferably: Windows Server 2012 R2

Alternatively: Windows Server 2008 R2

Servers will be virtual guests under VMware vSphere v5.1. We expect to upgrade to vSphere v6 late 2016 or early 2017.

All applications must be capable of supporting, or running under, the environments described above.

PCs both desktop and laptop:

* Windows 7 Enterprise 32-bit
* Internet Explorer v11
* Office Professional Plus 2016
* Adobe Reader XI

All applications must support all the PC-based software listed above.

Tablets:

Typically, these will be Apple iPads, but we do have some Windows tablets which run:

* Windows Enterprise 8.1 64-bit
* Internet Explorer v11
* Office Professional Plus 2016
* Adobe Reader XI

Office 365:

We are making increasing use of Microsoft’s Office 365 cloud platform. Our intranet is hosted on this and we plan to migrate all staff mailboxes to Exchange Online by December 2016. Access to the environment is by Active Directory Federation Services (ADFS).

Database:

We strongly prefer applications to use our Corporate SQL Servers (which include clusters), our current preferred version is SQL Server 2008, and we are moving to SQL Server 2012.  Though if applications require system roles (such as sysadmin) or use Ole Automation Procedures (which give enhanced access to the operating system), then special arrangements will need to be made.

We also have corporate SQL Server Reporting Services and SQL Server Analyses Services if required.

Application Installation/Distribution

Applications should be provided as Microsoft Installer (MSI) packages to enable easy installation and distribution.

Network Connectivity

All computers that are attached to our network must be maintained according to the manufacturers’ recommendations. Typically, this means that security patches must be applied as they are released and anti-virus software must be installed and kept up to date.

All computers running Windows must be joined to our domain and maintained by the RBKC ICT team. They will carry out the tasks listed in the preceding paragraph. Bespoke processes will need to be established for computers which run other operating systems. These will still need to be managed and maintained to the same standard. Unmanaged devices will not be allowed to connect to the Council’s network.