



STRATEGY AND RESOURCES SCRUTINY COMMITTEE

To: **Scrutiny Committee Members** - Councillors Robertson (Chair), Sinnott (Vice-Chair), Baigent, Benstead, Bick, Cantrill, C. Smart and M. Smart

Alternates: Councillors Sarris and Smith

Leader of the Council: Councillor Herbert

Executive Councillor for Finance and Resources: Councillor Owers

Despatched: Wednesday, 11 March 2015

Date: Monday, 23 March 2015

Time: 5.00 pm

Venue: Committee Room 1 & 2 - Guildhall

Contact: James Goddard **Direct Dial:** 01223 457013

AGENDA – SECOND CIRCULATION

9 Risk Based Verification Review *(Pages 5 - 14)*

Report to follow

12 Replacement Telecommunications & Local Area Network *(Pages 15 - 50)*

Report to follow

16 Review of the Procurement Strategy 2015-18 *(Pages 51 - 76)*

Report to follow

Information for the Public

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To: Executive Councillor for Finance and Resources:
Councillor George Owers

Report by: Alison Cole - Head of Revenues and Benefits

Relevant scrutiny committee: Strategy & Resources
23/3/2015
Resources
Scrutiny
Committee

Wards affected: All Wards

RISK BASED VERIFICATION REVIEW

Not a Key Decision

1. Executive summary

- 1.1 Following the publication of DWP circular HB/CTB S11/2011, Local Authorities are able to implement a 'risk based' approach to verifying Housing and Council Tax Benefit claims.
- 1.2 This approach was adopted by Strategy and Resources Committee on 9 July 2012 and implementation was from the start of the following financial year 1 April 2013.

2. Recommendations

The Executive Councillor is recommended to:

- 2.1 Agree the continued use of Risk Based Verification as a means to verify claims for Housing Benefit and Council Tax Reduction for both new claims and changes in circumstances.
- 2.2 Agree changes to levels of verification within the High and Medium Risk Bands detailed at 3.7 and 3.8.
- 2.3 Delegate an annual review and future amendments the RBV process to the Head of Revenues and Benefits.

3. Background

- 3.1 Cambridge City Council has been using Risk Based Verification for processing aspects of Housing Benefit and Council Tax Reduction since 1 April 2013, a method of applying different levels of verification checks to benefit claims according to the predicted risk (of Fraud and/or Error) associated with those claims.
- 3.2 The risk algorithms have been developed to identify the likelihood that fraud and error exists in a claim and is built using historical local

authority data and its performance validated across a number of local authorities.

- 3.3 This check is carried out when processing a new claim and for most changes of circumstances and places the claim in a High, Medium or Low risk band. Changes that are notified from DWP are not subject to RBV as verification has already been carried out by that department.
- 3.4 Changes in RBV provider from April 2015 will mean that during the following six months, this action will be able to be carried out at the point a new claim or a change is notified electronically. This will further reduce the amount of paperwork that is required by the applicant or claimant, improving the claiming process for them.
- 3.5 In the original policy, High Risk claims were referred for a Credit Reference Check (CRA). However, this approach has not proven to be effective with few referrals identifying errors or fraud. Therefore a five month trial of also visiting all high risk referrals was undertaken. This trial revealed that 25% of the High Risk claims that were visited identified an undisclosed change.
- 3.6 The new software will also allow the three risk groups to be further split so that in High Risk there will be 3 levels, in Medium Risk there will be four levels and in Low Risk, eight levels.
- 3.7 We are proposing that in High Risk, the top level will be visited prior to any claim being put into payment or an advantageous change in entitlement being processed. Claims in the next level will have an intervention review by telephone or by post carried out after one month and the third level in High Risk will have an intervention review carried out after three months.
- 3.8 We are further recommending that all Medium Risk claims may now supply photocopied evidence rather than original documentation, reducing the need to attend the Customer Service Centre. This will assist with the transfer of scanning and indexing service to an outsourced provider.
- 3.9 Risk groups cannot be downgraded at any time by an Assessment Officer, but they can be upgraded with approval from a Team Leader. Additionally, where a claim is in the Medium Risk group but an Officer feels that it is prudent to request original documentation this may be allowed with approval from a Team Leader. Reasons for upgrading a claim or asking for original documentation may include previous fraud, previous late notification of changes or where there is good reason to doubt the accuracy of the information provided.
- 3.10 The original policy was approved by Internal Audit and Section 151 Officer. Additionally, external auditors Ernst and Young have carried out a full Housing Benefit audit with no issues relating to the verification of new claims or changes in circumstances.

4 Implications

(a) Financial Implications

- 4.1 The software will support the verification of both Housing Benefit and Council Tax Reduction claims.

(b) Staffing Implications

- 4.2 None identified.

(c) Equality and Poverty Implications

- 4.3 RBV will apply to all claims for Housing Benefit and Council Tax Reduction. The risk algorithms used are based on all benefit claims and do not concentrate on any of the protected categories although it is recognised that many of our claimants are people with these protected categories.

(d) Environmental Implications

- 4.4 Nil.

(e) Procurement

- 4.5 Procurement of the new application is £11,500 per year (£9,500 for the 2015/16 as the E-Claiming software will not be available until the autumn). This will represent a saving of £3,000 per annum on the current software and will also provide greater efficiencies as there is better integration with the back office calculation software and the document management software.

(f) Consultation and communication

- 4.6 Consultation is not required. Policy documents relating to the administration of RBV should not be made public due to the sensitivity of its contents according to enabling DWP Circular S11/2011.

(g) Community Safety

- 4.7 Nil.

5 Background Papers

- 5.1 None

6 Appendices

Circular S11/2011 attached

7 Inspection of papers

To inspect the background papers or if you have a query on the report please contact:

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Housing Benefit and Council Tax Benefit Circular

Department for Work and Pensions

1st Floor, Caxton House, Tothill Street, London SW1H 9NA

HB/CTB S11/2011

SUBSIDY CIRCULAR

WHO SHOULD READ	All Housing Benefit (HB) and Council Tax Benefit (CTB) staff
ACTION	For information
SUBJECT	Risk-Based Verification of HB/CTB Claims Guidance

Guidance Manual

The information in this circular does not affect the content of the HB/CTB Guidance Manual.

Queries

If you

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Risk-Based Verification of HB/CTB Claims Guidance

Introduction

1. This guidance outlines the Department's policy on Risk-Based Verification (RBV) of Housing Benefit and Council Tax Benefit (HB/CTB) claims.

Background

2. RBV allows more intense verification activity to be focussed on claims more prone to fraud and error. It is practiced on aspects of claims in Jobcentre Plus (JCP) and the Pension Disability and Carers Service (PDCS). Local authorities (LAs) have long argued that they should operate a similar system. It is the intention that RBV will be applied to all Universal Credit claims.
3. Given that RBV is practised in JCP and PDCS, the majority (up to 80%) of HB/CTB claims received in an LA may have been subject to some form of RBV. Already 16 LAs operate RBV. Results from these LAs have been impressive. In each case the % of fraud and error identified has increased against local baselines taken from cells 222 and 231 of the Single Housing Benefit Extract (SHBE). In addition, in common with the experience of JCP and PDCS there have been efficiencies in areas such as postage and storage and processing times have improved.
4. We therefore wish to extend RBV on a **voluntary basis** to all LAs from April 2012.

This guidance explains the following;

- What is RBV?
- How does RBV work?
- The requirements for LAs that adopt RBV
- How RBV claims will be certified
- What are the subsidy implications?

What is RBV?

5. RBV is a method of applying different levels of checks to benefit claims according to the risk associated with those claims. LAs will still be required to comply with relevant legislation (Social Security Administration Act 1992, section 1 relating to production of National Insurance numbers to provide evidence of identity) while making maximum use of intelligence to target more extensive verification activity on those claims shown to be at greater risk of fraud or error.
6. LAs have to take into account HB Regulation 86 and Council Tax Benefit Regulation 72 when verifying claims. The former states:

“a person who makes a claim, or a person to whom housing benefit has been awarded, shall furnish such certificates, documents, information and evidence in connection with the claim or the award, or any question arising out of the claim or the award, as may reasonably be required by the relevant authority in order to determine that person’s entitlement to, or continuing entitlement to housing benefit and shall do so within one month of being required to do so or such longer period as the relevant authority may consider reasonable.”

Council Tax Benefit Regulation 72 is similar.

7. These Regulations do not impose a requirement on authorities in relation to what **specific** information and evidence they should obtain from a claimant. However, it does require an authority to have information which allows an **accurate assessment** of a claimant’s entitlement, both when a claim is first made and when the claim is reviewed. A test of reasonableness should be applied.

How does RBV work?

8. RBV assigns a risk rating to each HB/CTB claim. This determines the level of verification required. Greater activity is therefore targeted toward checking those cases deemed to be at highest risk of involving fraud and/or error.
9. The classification of risk groups will be a matter for LAs to decide. For example, claims might be divided into 3 categories:
 - **Low Risk Claims:** Only essential checks are made, such as proof of identity. Consequently these claims are processed much faster than before and with significantly reduced effort from Benefit Officers without increasing the risk of fraud or error.
 - **Medium Risk Claims:** These are verified in the same way as all claims currently, with evidence of original documents required. As now, current arrangements may differ from LA to LA and it is up to LAs to ensure that they are minimising the risk to fraud and error through the approach taken.
 - **High Risk Claims:** Enhanced stringency is applied to verification. Individual LAs apply a variety of checking methods depending on local circumstances. This could include Credit Reference Agency checks, visits, increased documentation requirements etc. Resource that has been freed up from the streamlined approach to low risk claims can be focused on these high risk claims.
10. We would expect no more than around 55% of claims to be assessed as low risk, with around 25% medium risk and 20% high risk. These figures could vary from LA to LA according to the LA’s risk profiling. An additional expectation is that there should be more fraud and error detected in high risk claims when compared with medium risk claims and a greater % in medium risk than low risk. Where this proves not to be the case the risk profile should be revisited.
11. LAs may adopt different approaches to risk profile their claimants. Typically this will include the use of IT tools in support of their policy, however, the use of clerical systems is acceptable.

12. Some IT tools use a propensity model¹ which assesses against a number of components based on millions of claim assessments to classify the claim into one of the three categories above. Any IT system² must also ensure that the risk profiles include 'blind cases' where a sample of low or medium risk cases are allocated to a higher risk group, thus requiring heightened verification. This is done in order to test and refine the software assumptions.
13. Once the category is identified, individual claims cannot be downgraded by the benefit processor to a lower risk group. They can however, exceptionally, be upgraded if the processor has reasons to think this is appropriate.

The requirements for LAs that adopt RBV

14. RBV will be voluntary. However, all LAs opting to apply RBV will be required to have in place a **RBV Policy** detailing the risk profiles, verification standards which will apply and the minimum number of claims to be checked. We consider it to be good practice for the Policy to be examined by the authority's Audit and Risk Committee or similar appropriate body if they exist. The Policy must be submitted for Members' approval and sign-off along with a covering report confirming the Section 151 Officer's (section 85 for Scotland) agreement/recommendation. The information held in the Policy, which would include the risk categories, should not be made public due to the sensitivity of its contents.
15. The Policy must allow Members, officers and external auditors to be clear about the levels of verification necessary. It must be reviewed annually but not changed in-year as this would complicate the audit process.
16. Every participating LA will need a robust baseline against which to record the impact of RBV. The source of this baseline is for the LA to determine. Some LAs carry out intensive activity (along the lines of the HB Review) to measure the stock of fraud and error in their locality. We suggest that the figures derived from cells 222 and 231 of SHBE would constitute a baseline of fraud and error currently identified by LAs.
17. Performance using RBV would need to be monitored monthly to ensure its effectiveness. Reporting, which must be part of the overall Policy, must, as a minimum, include the % of cases in each risk category and the levels of fraud and error detected in each.

How RBV claims will be certified?

18. Auditors will check during the annual certification that the subsidy claim adheres to the LA's RBV Policy which will state the necessary level of verification needed to support the correct processing of each type of HB/CTB claim. The risk category will need to be recorded against each claim. Normally the LA's benefit IT/clerical system will allow this annotation.

¹ Whilst DWP is of the opinion that the use of IT will support the success of RBV, it does not in anyway endorse any product or company

² The same safeguard must be applied to clerical systems

Other considerations

19. The sample selection for HB/CTB cases will not change i.e. 20 cases will be selected for each headline cell on the claim form. The HB COUNT guidance used by the external auditors for certification will include instructions for how to deal with both non-RBV and RBV cases if selected in the sample. For non-RBV cases, the verification requirements will remain the same i.e. LAs will be expected to provide all the documentary evidence to support the claim.

What are the subsidy implications?

20. Failure by a LA to apply verification standards to HB/CTB claims as stipulated in its RBV Policy will cause the expenditure to be treated as LA error. The auditor will identify this error and if deemed necessary extrapolate the extent and, where appropriate, issue a qualifying letter. In determining the subsidy implications, the extrapolation of this error will be based on the RBV cases where the error occurred. For this reason, it is important that RBV case information is routinely collected by ensuring that LA HB systems incorporate a flag to identify these RBV cases. If sub-populations on RBV cases can not be identified, extrapolations will have to be performed across the whole population in the particular cell in question.
21. We will now work with the respective audit bodies to incorporate this into the COUNT guidance. If you have any queries please contact Manny Ibiayo by e-mail HBCTB.SUBSIDYQUERIES@DWP.GSI.GOV.UK



Cambridge City Council

Project Appraisal and Scrutiny Committee Recommendation

Project Name: Telecommunications

To: Executive Councillor for Strategy and Transformation

Report by: Tony Allen

Scrutiny committee: STRATEGY & RESOURCES
23 MARCH 2015

Wards affected: All

Recommendation/s

Financial recommendations –

- The Executive Councillor is asked to recommend this scheme (which is included as a Capital Project Under Development within the Budget Setting Report) for approval by Council, subject to resources being available to fund the capital and revenue costs.
 - The total cost of the project is £400,000, funded from reserves.
 - At this stage no revenue implications are anticipated, but any arising will be addressed through the Mid-Year Financial Review.
 - On approval, the scheme will move from Projects Under Development to the Capital Plan and will be able to commence.

Procurement recommendations:

- The Executive Councillor is asked to approve giving the Director of Business Transformation authority to take delegated decisions in consultation with the Executive Councillor, chair and opposition spokes as required during the procurement process.

Project Name: Telecommunications

1 Summary

1.1 The project

Purchase and implementation of a new hosted telecommunications systems including contact centre features for 3 years initially plus up to a further 2 years.

Target Dates:

Start of procurement	February 2015
Award of Contract	April 2015
Start of project delivery	April 2015
Completion of project	September 2015
Date that project output is expected to become operational (if not same as above)	September 2015

1.2 Anticipated Cost

Total Project Cost	£400,000
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Cost Funded from:

Funding:	Amount:	Details:
Reserves	£400,000	
Developer Contributions	£	
Climate Change Fund	£	
Other	£	

1.3 Procurement process

The procurement will use Cabinet Office framework RM1498 via a competition.

Networking equipment will be procured using the existing ICT contract with Northgate Information Solutions.

2 Project Appraisal & Procurement Report

2.1 Project Background

The Council's current telephone systems were installed in 1982, and the time has come to replace this equipment due to:

- The ISDX systems are incapable of supporting the Council's emerging requirement for a modern and flexible telephony service.
- Siemens has announced that formal support for the ISDX will cease in March 2017.
- The Council will be open to a number of major operational and reputational risks if it continues to rely on the ageing and obsolescent telephone systems.

Following a market research exercise which looked at a number of models it was identified that a hosted telephone service and contact centre would meet the Council's need for flexibility in terms of staff numbers and location.

The delivery of a new telephone service will enable the Council's accommodation and new ways of working strategies, releasing savings by flexible working and closure of Council office space.

2.2 Aims & objectives

- To procure a replacement telecommunications system including contact centre
- To implement the replacement telephone system
- To ensure the network is modified to support the new telephone system
- To withdraw and decommission the existing telephone system.

2.3 Major issues for stakeholders & other departments

- All users will have a new phone system to use, but training will be provided
- The project will aim to keep disruption to members of staff during the migration to a minimum

2.4 Summarise key risks associated with the project

This project will mitigate the following risks:

- The Council will be open to a number of major operational and reputational risks if it continues to rely on the ageing and obsolescent telephone systems.
- The Council may not be able to achieve its future savings targets if it is unable to adopt flexible working practices.

This project has the following risks associated:

- The project may not be affordable
- The final solution may not work
- Organisations will not bid

These risks have been mitigated by carrying out a market research exercise, engaging a subject matter expert and by using a Government Framework for telecommunications with pre-selected providers.

2.5 Financial implications

- a. Appraisal prepared on the following price base: 2015/16
- b. Specific grant funding conditions are:
 -
- c. Other comments

2.6 Net revenue implications (costs or savings)

Revenue costs will be financed from existing budgets. If any revenue implications arise they will be addressed through the Mid-Year Financial Review.

2.10 Other implications

- An Equality Impact Assessment (EqIA) has not been prepared for this project.
- Customer Services have completed an EqIA's for Self Serve and automated switchboard.
- A report went to full Council on the 26th February that assessed the corporate impact on the changes in the Contact Centre. This report is available here:

<http://democracy.cambridge.gov.uk/documents/b9013/Budget%20Setting%20Report%20201516%20Version%204%20FINAL%2026th-Feb-2015%2018.00%20Council.pdf?T=9>

- A formal EqIA after discussion with Strategy and Partnerships is not required. However a positive impact is anticipated overall. The new system will enable users to work more flexibly, allowing users to transition easier between work, district and home locations.
- We will review the potential impacts during the implementation.

2.11 Staff required to deliver the project

- There will be staff training for all staff. Project Management activities from within the ICT Client Team, but the majority of implementation work will be undertaken by third parties.

2.12 Dependency on other work or projects

- The delivery of a new telecommunications system directly underpins the Council's accommodation strategy, supporting flexible and mobile working and hot desking.

2.13 Background Papers

n/a

2.14 Inspection of papers

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Date prepared:	23 February 2015

Capital Project Appraisal - Capital costs & funding - Profiling

Appendix A

	2013/14	2014/15	2015/16	2016/17	2017/18	Comments
	£	£	£	£	£	
Capital Costs						
Building contractor / works						
Purchase of vehicles, plant & equipment			100,000			
Professional fees			156,000			
Other capital expenditure:			144,000			
Total Capital cost	0	0	400,000	0	0	
Capital Income / Funding						
Government Grant						
Developer Contributions						
Earmarked Funds						
Existing capital programme funding						
Revenue contributions						
Total Income	0	0	0	0	0	
Net Capital Bid	0	0	400,000	0	0	

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Cambridge City Council Equality Impact Assessment

Completing an Equality Impact Assessment will help you to think about what impact your strategy, policy, plan, project, contract or major change to your service may have on people that live in, work in or visit Cambridge, as well as on City Council staff.



The template is easy to use. You do not need to have specialist equalities knowledge to complete it. It asks you to make judgements based on evidence and experience. There are guidance notes on the intranet to help you. You can also get advice from Suzanne Goff, Strategy Officer on 01223 457174 or email suzanne.goff@cambridge.gov.uk or from any member of the Joint Equalities Group.

1. Title of strategy, policy, plan, project, contract or major change to your service:

The introduction of an electronic switchboard.

2. What is the objective or purpose of your strategy, policy, plan, project, contract or major change to your service?

Currently customer services receive an average of 9000 switchboard calls per month. Approximately 60% of these calls are answered by a concierge customer service advisor at the Guildhall, the remaining 40% of calls overspill into the CSC for answering.

Over 70% of customers calling the general enquiries line 01223 457000 know the person or department they want to speak to and the operator simply transfers the call as requested on a cold transfer basis.

The remaining 30% of customers calling the number need assistance to understand what their needs are. Once this has been established the call is again cold transferred to the person or department identified.

The purpose of introducing the electronic switchboard is to improve the experience of customers calling Cambridge City Council.

Historically customers calling the general enquiries number have received an almost an immediate answer. To maximise efficiencies and to ensure that staffing levels are highest where the complicated queries are received, dedicated staffing levels have been reduced for this service and an overflow system has been introduced.

This has resulted in longer queuing times for customers to have their calls answered initially.

The electronic switchboard system will mean customers will not queue to have their call answered, by saying the name of the service or person they want to speak to their call will automatically be forwarded.

Where customers do not know the person or department they want to speak to their call will be directed to the customer service centre for an advisor to assist them.

The objective for the strategy is to:

- To provide a more immediate answer service for our customers
- To create capacity in the CSC to cope with peaks in demand and to enable more focus on the complex queries and vulnerable customers
- To achieve savings target of £15,000.

3. Who will be affected by this strategy, policy, plan, project, contract or major change to your service? (Please tick those that apply)

Residents

Visitors / customers calling the customer service centre

Staff

A specific client group or groups (please state):

4. What type of strategy, policy, plan, project, contract or major change to your service is this? (Please tick)

- New
 Revised
 Existing

5. Responsible directorate and service

Directorate: Business Transformation

Service: Customer Services

6. Are other departments or partners involved in delivering this strategy, policy, plan, project, contract or major change to your service?

- No
 Yes (please give details):

The general enquiries line services the whole council so there will need to be a communications plan and a mechanism to promote the understanding of how it will work and what actions departments need to take on an ongoing basis to make sure that customers are directed correctly when they call.

7. Potential impact

Please list and explain how this strategy, policy, plan, project, contract or major change to your service could **positively** or **negatively** affect individuals from the following equalities groups.

When answering this question, please think about:

- The results of relevant consultation that you or others have completed (for example with residents, people that work in or visit Cambridge, service users, staff or partner organisations).
- Complaints information.
- Performance information.
- Information about people using your service (for example whether people from certain equalities groups use the service more or less than others).
- Inspection results.
- Comparisons with other organisations.
- The implementation of your piece of work (don't just assess what you think the impact will be after you have completed your work, but also think about what steps you might have to take to make sure that the implementation of your work does not negatively impact on people from a particular equality group).
- The relevant premises involved.
- Your communications.
- National research (local information is not always available, particularly for some equalities groups, so use national research to provide evidence for your conclusions).

(a) Age (any group of people of a particular age, including younger and older people – in particular, please consider any safeguarding issues for children and vulnerable adults)

Anticipated score = - 2

Younger people will not be adversely affected by this strategy. They are used to self-service options and can navigate through them without difficulty.

Older people could be adversely affected by the introduction of this service. Automated options can be difficult for older people to use however there will be a clear option to speak to an advisor if required.

A number of other local authorities including Windsor and Maidenhead are using an electronic switchboard. They have experienced a reduction in call volumes needing an advisor intervention of at least 50%. On the basis that this outcome is replicated at Cambridge City Council customers of any age will experience:

- An immediate answer and transfer to the person or department they need to speak to – which will reduce frustrations and complaints
- The customer service centre performance for calls answered will improve, enabling older customers to have their queries dealt with quicker.
- Communications will be carried out via Cambridge matters and the web site.

A review of the initiative will take place after 6 months which will look at customer feedback, complaints and performance to establish if the benefits of the initiative have been realised and how our customers are using the service.

(b) Disability (including people with a physical impairment, sensory impairment, learning disability, mental health problem or other condition which has an impact on their daily life)

Anticipated score = - 2

People with learning disabilities, mental health problems could be adversely affected by the introduction of this service.

A number of other local authorities including Windsor and Maidenhead are using an electronic switchboard. They have experienced a reduction in call volumes needing an advisor intervention of at least 50%. On the basis that this outcome is replicated at Cambridge City Council customers of any age will experience:

- An immediate answer and transfer to the person or department they need to speak to – which will reduce frustrations and complaints
- The customer service centre performance for calls answered will improve, enabling older customers to have their queries dealt with quicker.
- Communications will be carried out via Cambridge matters and the web site.

A review of the initiative will take place after 6 months which will look at customer feedback, complaints and performance to establish if the benefits of the initiative have been realised and how our customers are using the service.

(c) Gender

Anticipated score = 0

This initiative will not adversely impact this equalities group.

(d) Pregnancy and maternity

Anticipated score = 0

This initiative will not adversely impact this equalities group.

(e) Transgender (including gender re-assignment)

Anticipated score = 0

This initiative will not adversely impact this equalities group.

(f) Marriage and Civil Partnership

Anticipated score = 0

This initiative will not adversely impact this equalities group.

(g) Race or Ethnicity

Anticipated score = - 2

Some people within the race or ethnicity equalities group could be affected by this initiative.

Customers whose first language is not English could be adversely affected by the introduction of this service, however there are options for customers to exit the system and speak to an advisor. Our experience within the CSC has shown that a very small percentage of customers that contact us by telephone are unable to speak English; they prefer to seek advice face to face where an interpreter is more easily facilitated.

A number of other local authorities including Windsor and Maidenhead are using an electronic switchboard. They have experienced a reduction in call volumes needing an advisor intervention of at least 50%. On the basis that this outcome is replicated at Cambridge City Council customers of any age will experience:

- An immediate answer and transfer to the person or department they need to speak to – which will reduce frustrations and complaints
- The customer service centre performance for calls answered will improve, enabling older customers to have their queries dealt with quicker.
- Communications will be carried out via Cambridge matters and the web site.

A review of the initiative will take place after 6 months which will look at customer feedback, complaints and performance to establish if the benefits of the initiative have been realised and how our customers are using the service.

(h) Religion or Belief

Anticipated score = 0

This initiative will not adversely impact this equalities group.

(i) Sexual Orientation

Anticipated score = 0

This initiative will not adversely impact this equalities group.

(j) Other factors that may lead to inequality – in particular – please consider the impact of any changes on low income groups or those experiencing the impacts of poverty (please state):

I do not anticipate this initiative causing inequality in any other way.

8. If you have any additional comments please add them here

9. Conclusions and Next Steps

- If you have not identified any negative impacts, please sign off this form.
- If you have identified potential negative actions, you must complete the action plan at the end of this document to set out how you propose to mitigate the impact. If you do not feel that the potential negative impact can be mitigated, you must complete question 8 to explain why that is the case.
- If there is insufficient evidence to say whether or not there is likely to be a negative impact, please complete the action plan setting out what additional information you need to gather to complete the assessment.

All completed Equality Impact Assessments must be emailed to Suzanne Goff, Strategy Officer, who will arrange for it to be published on the City Council's website.
Email suzanne.goff@cambridge.gov.uk

10. Sign off

Name and job title of assessment lead officer: Clarissa Norman, Customer Services Operations Manager

Names and job titles of other assessment team members and people consulted:
Jonathan James, Head of Customer Services

Date of completion: 16th December 2014

Date of next review of the assessment: 6 months from implementation, likely to be September 2015

Action Plan

Equality Impact Assessment title: Electronic switchboard

Date of completion: 16th December 2014

Equality Group	Age
Details of possible disadvantage or negative impact	Older customers who have difficulty hearing or processing information may struggle with using the system
Action to be taken to address the disadvantage or negative impact	There will be options available for customer to exit the system to speak to an advisor. A review of the impact the system has will be undertaken using customer feedback as a key aspect of the review.
Officer responsible for progressing the action	Clarissa Norman
Date action to be completed by	October 2015

Equality Group	Disability
Details of possible disadvantage or negative impact	Customers who find it difficult to process information or who have mental health problems may find it difficult to use the system.
Action to be taken to address the disadvantage or negative impact	There will be options available for customer to exit the system to speak to an advisor. A review of the impact the system has will be undertaken using customer feedback as a key aspect of the review.
Officer responsible for progressing the action	Clarissa Norman
Date action to be completed by	October 2015

Equality Group	Gender
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Pregnancy and Maternity
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Transgender
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Marriage and Civil Partnership
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Race or Ethnicity
Details of possible disadvantage or negative impact	Customers whose first language is not English may not be able to understand how to ask for the person /department they need to speak to.
Action to be taken to address the disadvantage or negative impact	<p>Within the system, there will be parameters built in where customers pressing their key pads repeatedly will be diverted to the contact centre.</p> <p>A review of the impact the system has will be undertaken looking at the number of customers abandoning the system, at which point and how they do this. Customer feedback will also be reviewed.</p>
Officer responsible for progressing the action	Clarissa Norman
Date action to be completed by	October 2015

Equality Group	Religion or Belief
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Sexual Orientation
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Other factors that may lead to inequality	
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Cambridge City Council Equality Impact Assessment

Completing an Equality Impact Assessment will help you to think about what impact your strategy, policy, plan, project, contract or major change to your service may have on people that live in, work in or visit Cambridge, as well as on City Council staff.



The template is easy to use. You do not need to have specialist equalities knowledge to complete it. It asks you to make judgements based on evidence and experience. There are guidance notes on the intranet to help you. You can also get advice from Suzanne Goff, Strategy Officer on 01223 457174 or email suzanne.goff@cambridge.gov.uk or from any member of the Joint Equalities Group.

1. Title of strategy, policy, plan, project, contract or major change to your service:

Telephony self-serve – 24/7 information giving and information gathering service.

2. What is the objective or purpose of your strategy, policy, plan, project, contract or major change to your service?

The service provided by advisors within the CSC is end to end. Customers appreciate this service as their enquiries are dealt with at first point of contact.

The operational issues around this service provision are that when there are peaks in demand or after bulk mailings have been sent to customers, council tax recovery notices for example, customer waiting times are adversely affected.

As a consequence of the team being multi-skilled in a range of service areas, customers can be making a call for homelink for example and because council tax reminders have been issued, the availability of a staff member to assist them is reduced due to the increased number of contacts the reminders have prompted.

Over recent months there has been a range of advancements in the options for customers to self-serve. Where they have access and the ability, customers can now apply for homelink, housing benefit, register for Council Tax and inform us about changes in circumstances on line without this task needing to be dealt with by an advisor.

We have trialled triaging customers calling with queries which can now be dealt with via self-serve by asking them to complete the relevant web form themselves. The results are that a majority of customers are happy to complete the forms themselves.

This approach has created a degree of capacity within the centre, however our ability to cope with peaks in demand has not been resolved and we are noticing an increased number of complaints from customers concerning our waiting times.

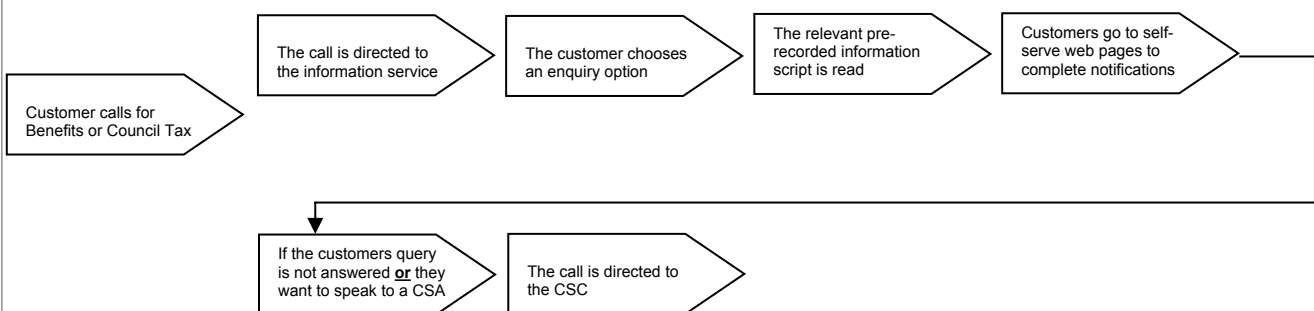
We are implementing the 24/7 information giving and gathering service on a pilot basis for the Council Tax and Benefits service areas.

The service is designed to give 24/7 information on the basic and general information most frequently asked of the CSC team. The maximum time a customer will spend in the self service module is 2 minutes 30 seconds.

Because the service is automated there is no queuing for customers and they do have the option to be put through to an advisor.

If this is successful there is scope for this to be widened to include other departments.

The information giving and gathering service works as below:



2. What is the objective or purpose of your strategy, policy, plan, project, contract or major change to your service?

The objective for the strategy is to:

- widen the information provision we are currently able to provide through CSA's and our web pages
- To provide more immediate answers to the basic questions customers have
- To create capacity in the CSC to cope with peaks in demand and to enable more focus on the complex queries and vulnerable customers
- To achieve savings target of £50,000.

3. Who will be affected by this strategy, policy, plan, project, contract or major change to your service? (Please tick those that apply)

- Residents
- Visitors / customers calling the customer service centre
- Staff

A specific client group or groups (please state):

4. What type of strategy, policy, plan, project, contract or major change to your service is this? (Please tick)

- New
- Revised
- Existing

5. Responsible directorate and service

Directorate: Business Transformation

Service: Customer Services

6. Are other departments or partners involved in delivering this strategy, policy, plan, project, contract or major change to your service?

- No
- Yes (please give details):

Revenue and Benefits services – discussions have taken place with the relevant managers explaining the initiative and plans will be put into place to mitigate any potential transfer of workload.

7. Potential impact

Please list and explain how this strategy, policy, plan, project, contract or major change to your service could **positively** or **negatively** affect individuals from the following equalities groups.

When answering this question, please think about:

- The results of relevant consultation that you or others have completed (for example with residents, people that work in or visit Cambridge, service users, staff or partner organisations).
- Complaints information.
- Performance information.
- Information about people using your service (for example whether people from certain equalities groups use the service more or less than others).
- Inspection results.
- Comparisons with other organisations.
- The implementation of your piece of work (don't just assess what you think the impact will be after you have completed your work, but also think about what steps you might have to take to make sure that the implementation of your work does not negatively impact on people from a particular equality group).
- The relevant premises involved.
- Your communications.
- National research (local information is not always available, particularly for some equalities groups, so use national research to provide evidence for your conclusions).

(a) Age (any group of people of a particular age, including younger and older people – in particular, please consider any safeguarding issues for children and vulnerable adults)

Anticipated score = - 2

Younger people will not be adversely affected by this strategy. They are used to self-service options and can navigate through them without difficulty.

Older people could be adversely affected by the introduction of this service. Automated options can be difficult for older people to use, if they are hard of hearing they are not able to adjust the volume to hear what the messages are saying. They are also unable to ask clarification questions.

A number of other local authorities including Tower Hamlets and Bristol city council are using this system. They have experienced a reduction in call volumes needing an advisor intervention of at least 30%. On the basis that this outcome is replicated at Cambridge City Council customers of any age will experience:

- An immediate answer to their questions – which will reduce frustrations and complaints
- The customer service centre performance for calls answered will improve, enabling older customers to have their queries dealt with quicker.
- Communications will be carried out via Cambridge matters and the web site.

A review of the initiative will take place after 6 months which will look at customer feedback, complaints and performance to establish if the benefits of the initiative have been realised and how our customers are using the service.

(b) Disability (including people with a physical impairment, sensory impairment, learning disability, mental health problem or other condition which has an impact on their daily life)

Anticipated score = - 2

Some people with disabilities will not be adversely affected by this strategy. Customers who struggle to converse, or have a physical impairment but need to access information or provide change in circumstances details may prefer to use the self-service option.

People with learning disabilities, mental health problems could be adversely affected by the introduction of this service. Automated options can be difficult for people to use if the customer cannot ask clarification questions.

A number of other local authorities including Tower Hamlets and Bristol city council are using this system. They have experienced a reduction in call volumes needing an advisor intervention of at least 30%. On the basis that this outcome is replicated at Cambridge City Council all customers calling the CSC will experience:

- An immediate answer to their questions – which will reduce frustrations and complaints
- The customer service centre performance for calls answered will improve, enabling older customers to have their queries dealt with quicker.
- Communications will be carried out via Cambridge matters and the web site.

Which will benefit those customers who do need to converse with an advisor

A review of the initiative will take place after 6 months which will look at customer feedback, complaints and performance to establish if the benefits of the initiative have been realised and how our customers are using the service.

(c) Gender

Anticipated score = 1

This initiative will not adversely impact this equalities group, indeed the extension of information provision to 24/7 and the enhanced opportunities to provide information to the council will enhance the services we will be providing.

(d) Pregnancy and maternity

Anticipated score = 1

This initiative will not adversely impact this equalities group, indeed the extension of information provision to 24/7 and the enhanced opportunities to provide information to the council will enhance the services we will be providing.

(e) Transgender (including gender re-assignment)

Anticipated score = 3

This initiative will not adversely impact this equalities group, indeed the extension of information provision to 24/7 and the enhanced opportunities to provide information to the council will enhance the services we will be providing.

(f) Marriage and Civil Partnership

Anticipated score = 1

This initiative will not adversely impact this equalities group, indeed the extension of information provision to 24/7 and the enhanced opportunities to provide information to the council will enhance the services we will be providing.

(g) Race or Ethnicity

Anticipated score = - 2

Some people within the race or ethnicity equalities group could be affected by this initiative.

Customers whose first language is not English could be adversely affected by the introduction of this service, however there are options for customers to exit the system and speak to an advisor. Our experience within the CSC has shown that a very small percentage of customers that contact us by telephone are unable to speak English; they prefer to seek advice face to face where an interpreter is more easily facilitated.

A number of other local authorities including Tower Hamlets and Bristol city council are using this system. They have experienced a reduction in call volumes needing an advisor intervention of at least 30%. On the basis that this outcome is replicated at Cambridge City Council all customers calling the CSC will experience:

- An immediate answer to their questions – which will reduce frustrations and complaints
- The customer service centre performance for calls answered will improve, enabling older customers to have their queries dealt with quicker.
- Communications will be carried out via Cambridge matters and the web site.

Which will benefit those customers who do need to converse with an advisor

A review of the initiative will take place after 6 months which will look at customer feedback, complaints and performance to establish if the benefits of the initiative have been realised and how our customers are using the service

(h) Religion or Belief

Anticipated score = 1

This initiative will not adversely impact this equalities group, indeed the extension of information provision to 24/7 and the enhanced opportunities to provide information to the council will enhance the services we will be providing.

(i) Sexual Orientation

Anticipated score = 1

This initiative will not adversely impact this equalities group, indeed the extension of information provision to 24/7 and the enhanced opportunities to provide information to the council will enhance the services we will be providing.

(j) Other factors that may lead to inequality – in particular – please consider the impact of any changes on low income groups or those experiencing the impacts of poverty (please state):

I do not anticipate this initiative causing inequality in any other way.

8. If you have any additional comments please add them here

9. Conclusions and Next Steps

- If you have not identified any negative impacts, please sign off this form.
- If you have identified potential negative actions, you must complete the action plan at the end of this document to set out how you propose to mitigate the impact. If you do not feel that the potential negative impact can be mitigated, you must complete question 8 to explain why that is the case.
- If there is insufficient evidence to say whether or not there is likely to be a negative impact, please complete the action plan setting out what additional information you need to gather to complete the assessment.

All completed Equality Impact Assessments must be emailed to Suzanne Goff, Strategy Officer, who will arrange for it to be published on the City Council's website.
Email suzanne.goff@cambridge.gov.uk

10. Sign off

Name and job title of assessment lead officer: Clarissa Norman, Customer Services Operations Manager

Names and job titles of other assessment team members and people consulted: Jonathan James, Head of Customer Services

Date of completion: 16th December 2014

Date of next review of the assessment: 6 months from implementation, likely to be September 2015

Action Plan

Equality Impact Assessment title: Telephony self-serve - 24/7 information giving and information gathering service.

Date of completion: 16th December 2014

Equality Group	Age
Details of possible disadvantage or negative impact	Older customers who have difficulty hearing or processing information may struggle with using self service
Action to be taken to address the disadvantage or negative impact	There will be options available for customer to exit the self-serve system to speak to an advisor. A review of the impact the system has will be undertaken using customer feedback as a key aspect of the review.
Officer responsible for progressing the action	Clarissa Norman
Date action to be completed by	October 2015

Equality Group	Disability
Details of possible disadvantage or negative impact	Customers who find it difficult to process information or who have mental health problems may find it difficult to use the self-serve system.
Action to be taken to address the disadvantage or negative impact	There will be options available for customer to exit the self-serve system to speak to an advisor. A review of the impact the system has will be undertaken using customer feedback as a key aspect of the review.
Officer responsible for progressing the action	Clarissa Norman
Date action to be completed by	October 2015

Equality Group	Gender
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
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Equality Group	Pregnancy and Maternity
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
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Equality Group	Transgender
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Marriage and Civil Partnership
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Race or Ethnicity
Details of possible disadvantage or negative impact	Customers whose first language is not English may not be able to understand the information being given within the system.
Action to be taken to address the disadvantage or negative impact	<p>Within the system, there will be parameters built in where customers pressing their key pads repeatedly will be diverted to the contact centre.</p> <p>A review of the impact the system has will be undertaken looking at the number of customers abandoning the system, at which point and how they do this. Customer feedback will also be reviewed.</p>
Officer responsible for progressing the action	Clarissa Norman
Date action to be completed by	October 2015

Equality Group	Religion or Belief
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Sexual Orientation
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Other factors that may lead to inequality	
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

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To: Executive Councillor for Finance and Resources:
Councillor George Owers

Report by: Head of Legal Services

Relevant scrutiny committee: Strategy & Resources
23/3/2015
Scrutiny Committee

Wards affected: Abbey Arbury Castle Cherry Hinton Coleridge
East Chesterton King's Hedges Market Newnham
Petersfield Queen Edith's Romsey Trumpington
West Chesterton

PROCUREMENT STRATEGY 2015 - 2018

Key Decision

1. Executive summary

The Council's Procurement Strategy expires at the end of March 2015 and needs to be renewed. Attached at Appendix 1 to this report is a draft strategy for the period 2015-2018 for approval by the Executive Councillor.

2. Recommendations

The Executive Councillor is recommended:

To approve the draft Procurement Strategy appended to this report for publication and implementation

3. Background

3.1 The purpose of the Strategy is to provide strategic direction for procurement activity within the Council and to identify actions that we will take and principles that we will follow to maximise value for money from our procurement spend.

The Strategy is not intended to give detailed information or guidance about the process to be followed in any particular procurement. This sort of guidance can be found in the Procurement Quick Reference Guides which are currently published on the intranet for officers and will shortly be

published on the Council's website. Project specific advice can be sought from the Council's Strategic Procurement Team.

3.2 The Strategy has been designed to cover a relatively short period for two reasons. Firstly, the Council is undergoing a programme of transformation activity which ultimately may impact on all aspects of procurement. Secondly new legislation will, over a period of two years, mean that different methods of procurement must be explored and implemented. Just now we need to be flexible to be able to respond quickly to new opportunities and ways of working.

3.3 The Strategy sets out the key themes that we will follow in the next period. The themes reflect the Council's ambitions and the key messages that the Strategic team has identified from procurement activities across the Council. The Work Plan at section 7 of the Strategy identifies the steps that we will take to achieve the themes we have identified.

3.4 The new Strategy will continue the work started in the previous document. Both are grounded in the Council Vision and we will continue to concentrate on things that add value.

4. Implications

(a) Financial Implications

One of the key Strategy commitments is to achieve value from the money that we spend in our procurement activities. There are no specific financial implications arising from the Strategy itself. These will arise in the individual projects and will be considered at that time as part of the project planning and authorisation process.

(b) Staffing Implications (if not covered in Consultations Section)

The Strategic Team cannot itself deliver the work in the plan and will require input and support from others services to implement developmental work.

(c) Equality and Poverty Implications

The Strategy makes clear the Council's commitment to ensuring that appropriate equal opportunity requirements are incorporated and properly evaluated in the procurement projects we undertake.

The new Strategy reflects the Living Wage and Blacklisting policies which are designed to ensure the protection of contractor staff working on Council contracts.

The Strategic Team will continue to contribute to procurement related projects arising from the Anti-Poverty Strategy which is currently out to consultation.

A draft EQIA is attached as appendix 2 to this report.

(d) Environmental Implications

The initiatives and work referred to in this Strategy have the potential to have a medium impact via energy saving projects and better regulation of supply chains

(e) Procurement

All procurement implications are incorporated in the Strategy and in the body of this report.

(f) Consultation and communication

If approved, the new Strategy will be communicated to the internal procurement community by means of news items on the intranet and more widely by publication on the Council's website

(g) Community Safety

Community safety issues will be considered on a case by case basis for individual procurement projects.

5. Background papers

These background papers were used in the preparation of this report:

National Procurement Strategy <http://www.local.gov.uk/web/lg-procurement>
EQIA

6. Appendices

- A Draft Procurement Strategy 2015-2018
- B Draft EQIA

7. Inspection of papers

To inspect the background papers or if you have a query on the report please contact:

Author's Name: John Bridgwater
Author's Phone Number: 01223 - 458178
Author's Email: john.bridgwater@cambridge.gov.uk

CAMBRIDGE CITY COUNCIL PROCUREMENT STRATEGY

March 2015 – March 2018



Contents

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Useful Contacts

Please contact me if you have any questions or comments about this Procurement Strategy or about tendering for Council business:

Telephone:

John Bridgwater, Strategic Procurement Officer 01223 458178

E-mail:

john.bridgwater@cambridge.gov.uk

Address:

Procurement Team
Business Transformation Department
The Guildhall
Cambridge CB2 3QJ

1 Introduction

We have maintained a simple Procurement Strategy to reflect the Council's initiatives to remove unnecessary complexity from processes and procedures and to retain only those that add value to the services we deliver. This Strategy therefore sets out how we will:

- ◆ Make procurement easier for suppliers and the Council alike
- ◆ Increase the professionalism and commercial skill of those carrying out procurements for the Council

- ◆ Give opportunity to local and SME suppliers to participate by increasing visibility of our procurement plans and opportunities
- ◆ Maximise innovation, sustainability and collaboration in our procurement activities

There have been some significant changes since the last strategy was published, namely:-

The new Public Contracts Regulations 2015 came into force at the end of February 2015. These are intended to make procurements quicker, simpler and less costly to run.

In November 2013, the Council introduced a new set of simplified internal rules governing the conduct of procurement – the Contract Procedure Rules – which forms a part of its Constitution. Some changes will have to be made to those rules reflect the requirements of the Public Contract Regulations 2015

The Local Government Association has published a new National Procurement Strategy for Local Government in England 2014 which sets out a vision for local government procurement and encourages all councils in England to engage with the delivery of outcomes in four key areas; making savings, supporting local economies, leadership and modernising procurement. This strategy is consistent with the themes from the National Procurement Strategy <http://www.local.gov.uk/web/lq-procurement>

In November 2014, the Council was very pleased to become accredited by the Living Wage Foundation as a Living Wage Employer. As a consequence we ensure that, where a best value case is satisfied, contractor (and their sub-contractor) staff working on Council premises for 2 or more hours on any day in a week for 8 or more consecutive weeks are paid at least the national Living Wage.

In January 2015, the Council adopted a policy to prevent Council construction contracts being awarded to organisations that have been actively involved in blacklisting and have not taken appropriate remedial action.

The Council is developing an anti-poverty strategy looking at a series of initiatives to improve the lives of residents that are struggling in the current economic climate. Procurement projects can help to contribute to the anti-Poverty strategy, for example by:

- Mandating the payment of the Living Wage in appropriate contracts
- Seeking additional Social Value initiatives from suppliers as part of procurement projects
- Promoting schemes that can reduce people's utility bills, including energy and water saving measures.

More generally the Council has continued to respond to the Public Services (Social Value) Act 2012 by the promotion of local social values in contracts (such as the creation of apprenticeships and the local supply chains) and the impact of this is likely to grow.

Internally the Council continues to re-shape itself to deliver what it does as effectively as possible to produce more streamlined activities and to make savings.

This Strategy is intended to provide a high-level view about our direction of travel and the principles that we will follow. We hope that you will find this a useful document as you engage with us, and we with you, in the future.

2 Purpose of the Strategy

The Council historically spends approximately £40-45m a year externally on procuring goods, works and services and we need to maximise value from this expenditure. The next few years are likely to see further reductions in budgets so getting value for money is paramount.

This Strategy identifies the actions that we will take and the principles we will follow to maximise value from our procurement spend.

3 What is Procurement?

The Council itself directly provides some services from in house staff/ resources. Where we need to acquire goods, services or works that cannot be provided in house we procure those from external providers (which may be a contractor, third sector supplier or another public sector body). Procurement is the process that we use to acquire such goods, services and works from those external providers. Whilst responsibility for procurement resides in each Council service area, there are two officers in the corporate centre who assist service areas with their procurement responsibilities.

Procurement is different from buying. Buying is done on a day-to-day basis, sometimes from a contract put in place following a procurement process, other times from commercially available catalogues or company websites. Procurement is a strategic process that follows a clear pattern starting with identifying a need right through to reviewing the delivery of the contract and learning any lessons for future procurements.

Competitive procurement remains the cornerstone of the Council's procurement approach but there will be circumstances where a direct contract with a sole supplier will be appropriate.

4 The Council's Vision

The Council has set the following Vision for the Council.

One Cambridge - Fair for All

A city which believes that the clearest measure of progress is the dignity and well-being of its least well-off residents, which prioritises tackling poverty and social exclusion, recognising that greater social and economic equality are the most important preconditions for the city's success

An international city which celebrates its diversity and actively tackles discrimination on gender, race, nationality, ethnic background, religion, age disability, gender identity and sexual orientation.

A city in which all citizens feel they are listened to and have the opportunity to influence public decision making and which values, supports and responds to individual and community initiatives

A city where all citizens and organisations appreciate their duties as well as their rights. Where people are free to enjoy themselves but also show consideration for others and where the community works together to reduce harm and nuisance including by education and, where needed, robust enforcement of the law.

A city where "town and gown" combine and where mutual understanding and partnerships are developed through joint working, community initiatives and volunteering.

Cambridge - a great place to live, learn and work

A city which strives to ensure that all local households can secure a suitable, affordable, local home, close to jobs and neighbourhood facilities.

A city which draws inspiration from its unique qualities and environment and its iconic historic centre, and retains its sense of place across the city through positive planning, generous urban open spaces and well-designed buildings and by providing quality council services.

An entrepreneurial city with a thriving local economy in which businesses are assisted to build on their global and national pre-eminence in learning, discovery and production and develop a full range of local employment and skills development while also recognising and delivering on their social responsibilities.

A city where getting around is primarily by public transport, bike or on foot.

Cambridge - caring for the planet

A city that takes robust action to tackle the local and global threat of Climate Change, both internally and in partnership with local organisations and residents, and to minimise its environmental impact by cutting carbon, waste and pollution.

Each Portfolio Holder has approved the Strategic Priorities identified in their Portfolio Plans.

5 The Vision for Procurement

The vision for Procurement – where we want to be - is to enable the Council to procure what it needs to deliver the best services possible within its available resources. To do this we have adopted the following Strategic Themes for the period covered by the Strategy.

Strategic Theme 1

Straightforward: To make procurement as straightforward as possible for the Council and potential suppliers, in particular to improve access for local suppliers and SMEs and to eliminate anything that does not add value to the procurement.

Strategic Theme 2

Professional: To continue to embed professional procurement and contract management skills across the Council. This goes hand in hand with moves to increase the commercial acumen of the Council.

Strategic Theme 3

Maximise local opportunities: To support and encourage an effective local supplier market including the voluntary sector and the promotion of local social value in contracts (such as the creation of apprenticeships and local supply chains).

Strategic Theme 4

Strategic: To use sound procurement practices and innovative solutions to promote sustainability and value for money, making use of clear and detailed procurement/purchasing data, collaboration and partnership opportunities where this accords with the Council's Principles of partnership working https://www.cambridge.gov.uk/sites/www.cambridge.gov.uk/files/docs/Partnership_principles_Oct_2010.pdf

Strategic Theme 5

Fair: To ensure that, where applicable, our contractors comply with our Living Wage and Blacklisting Policies and to ensure that we take account of the possible impact that our approach to major projects might have on different groups of people and how.

The actions that we will take to deliver these Themes are set out in the Work Plan for the service at Section 7.

6 Our Procurement Principles

Fundamental to this strategy are our Procurement Principles. These are the principles that will guide how we conduct and further develop our procurement activities.

General

- 6.1 Throughout any procurement the Council will be clear about the outcomes and objectives it wants to achieve.
- 6.2 The Council's required outcomes from each procurement project will be properly assessed in relation to the Council's priorities, other statutory requirements and affordability.
- 6.3 The assessment of risk associated with each procurement project will aim to achieve a balance with commercial outcomes and placing risk where it is best managed.
- 6.4 Wherever possible requirements will be expressed in terms of outcome and performance to provide scope for bidder innovation.

Value for money

- 6.5 The Council will aim to increase value for money (defined, for the purposes of this Strategy as the best whole-life cost and quality ratio to fulfil the stated requirements) and reduce processing costs.
- 6.6 The Council will take a long-term strategic view of the procurement of its requirements, including the potential for innovative funding and the opportunity for working with other authorities especially for goods and services which can be procured more cost-effectively in a collaborative group.

Sustainability

- 6.7 Any procurement decision will aim to minimise harm to the environment and to promote conservation of natural resources.

The local supply base

- 6.8 The Council will support businesses local to Cambridge through a range of initiatives including:
 - ◆ Making it simpler to do business with the Council;
 - ◆ Reduce the bidding burden on suppliers.
 - ◆ Have regard to the impact on small/local firms of the way in which a procurement is structured

- ◆ Providing clear information about selling to the Council on our website;
- ◆ Using local advertising portals such as Source Cambridgeshire <http://www.sourcecambridgeshire.co.uk/> to focus the attention of locally based firms

Relationships with suppliers

- 6.9 In longer-term contracts, the Council will incorporate provisions for continuous improvement both within the contracted service and to the benefit of the community it is serving.
- 6.10 In higher value contracts the Council will challenge contractors to identify ways in which they can contribute to improving the economic, social and environmental well-being of Cambridge.
- 6.11 In construction contracts we will ask potential contractors to self-declare that have not been and will not be involved in blacklisting and where a potential contractor is unable to do this we will carry out a review in a proportionate and reasonable manner to conclude whether or not the organisation should be excluded from the competition.
- 6.12 Where contractors will be working on our premises, and where we are legally entitled to, we will require the contractor to pay at least the national Living Wage to all of their staff that work on the Council's premises for 2 or more hours in any day in a week for 8 or more consecutive weeks in the year. If a contractor is using a sub-contractor to deliver any of the contracted services the contractor will be required to ensure that the sub-contractor complies with the same Living Wage requirement.

Equality

- 6.13 Procurement processes and documentation will reflect the Council's Equalities and Diversity Policy.
- 6.14 Equality issues must be considered as a key requirement in any contract which involves direct contact with the public or where the contractor is acting on the Council's behalf in a public environment.

Our conduct

- 6.15 In all our dealings in the procurement process, the Council will preserve the highest standards of honesty, integrity, impartiality and objectivity and shall comply with the Council's Codes of Conduct at all times.
- 6.16 In selecting contractors the Council will generally evaluate offers received on the basis of the most economically advantageous tender (MEAT) and will take into account, where appropriate, whole life costing seeking an appropriate balance between cost and quality.

6.17 In any procurement the Council will ensure that its approach to the market is consistent with these principles.

7 Action Plan

The table below summarises the actions and initiatives planned over the Strategy period to achieve the outcomes set out in the Vision for Procurement at section 5. A target date for completion has also been included:

PROCUREMENT ACTION PLAN March 2015 – March 2018		
Strategic Theme	Action	Target Date
Straightforward procurement	Examine potential for increasing use of Purchasing Cards for low-value spend as part of wider transformation work.	October 2015
	Review impact of newly implemented EU Procurement Rules and UK legislation and make necessary changes to existing approaches.	In progress
	Investigate options to provide electronic procurement systems and prepare Business Case for any new system to satisfy new legislative requirements.	July 2017
Embed professional and contract management skills	Provide strategic professional advice to the corporate review to transform the way the Council procures its works, services and supplies and to propose a new model for procurement and purchasing activities across the Council.	March 2015 to Dec 2016
	Develop and deliver targeted training programme for officers undertaking procurements.	Ongoing
	Refresh and reissue Schedule of Proposed Procurements to promote timely contract renewals	Ongoing
Support and encourage the local supplier market	Revise guidance on Website about selling to the Council	July 2015
	Refresh and Publish online Schedule of Proposed Procurements to promote future contract opportunities Continue to use the Source Cambridgeshire portal as one of our main advertising media	Ongoing
Sound procurement practices and innovative solutions	Review scope for and deliver further corporate contracts to consolidate spend	Ongoing
	Revise template documents and guidance with intention of promoting scope for innovation by the market in appropriate procurements	December 2015
	Establish simple methodology for assessing best value case for using the Living Wage requirement in service and works contracts	September 2015

PROCUREMENT ACTION PLAN March 2015 – March 2018		
Strategic Theme	Action	Target Date
Fair procurement	Embed Black Listing protocols in procurement processes for construction contracts	2 nd Quarter 2015
	Ensure that EQIA are completed for all major procurement projects	Ongoing

Appendix A

Glossary of commonly used procurement terms and acronyms

This list includes some of the commonly used words, acronyms and phrases. It is not comprehensive and will be added to from time to time. If you think there is something that should be added to it please contact John Bridgwater, whose contact details are given at the start of this Strategy.

Agreement

Another word for “Contract”. The legally binding contract terms and conditions between the parties.

Category Management

An approach to procurement within the Council that places projects of a particular type (e.g. construction, IT) with staff that are expert in procurements of that type.

Collaboration

In this context, public sector organisations that engage in a joint procurement for works, services or supplies with the intention of obtaining better value for money through economies of scale and reduced tendering costs.

Commissioning

The process of specifying, securing and monitoring services to meet people’s needs at a strategic level. It applies to all services, whether they are provided by the local authority, NHS, other public agencies, or by the private and voluntary sectors

Competitive Tendering

Awarding contracts following a process to obtain competing tenders.

Contract

A binding agreement between two or more parties that is enforceable in law.

Contracts Finder

A central government advertising portal which local authorities are required to use for the publication of information about contract opportunities worth £25,000 or over.

Contract Officer

An officer of the Council who has been nominated to manage the contract.

Contractor

A firm or person who has entered into a contract with the Council to supply works, goods or services.

EU

European Union.

Evaluation

A detailed assessment and comparison by the Council of offers made in response to a request for quotations or tenders in accordance with published criteria.

Framework Agreement

An agreement with suppliers which sets out the terms and conditions (including maximum prices) under which specific orders can be made throughout the term of the agreement.

Invitation to Tender

A formal document inviting an organisation to tender to provide a service, supply goods or to carry out works for the Council. It will include the instructions for submitting a tender, the specification for the requirement, the criteria against which the tender will be assessed, the proposed terms and conditions for the contract and, sometimes, a business questionnaire.

ITT

Invitation to Tender.

KPI

Key Performance Indicator. KPIs are placed against certain elements of a contract or service level agreement and indicate the items that are to be measured to see if the contractor has achieved the required contract standard.

Life cycle costing

The systematic consideration of all relevant costs and revenues associated with the acquisition and ownership of an asset.

Local Suppliers or Suppliers local to Cambridge –defined on a case by case basis to reflect the type of procurement and the maturity of the supplier market within the City, County, sub-region, region.

MEAT

Most Economically Advantageous Tender

Method Statement

A document used in the invitation to quote or to tender which sets out specific questions for the bidder to answer to explain to the Council how a service is to be delivered/works to be carried out. The answers will be evaluated and form a part of the contract.

Most Economically Advantageous Quotation/Tender

The quotation or tender offering the Council the greatest benefit in terms of cost and quality.

OJEU

Official Journal of the European Union. The on-line publication in which notices advertising Council tenders that fall within the EU thresholds must be placed at the start and end of the procurement.

PQQ

Pre-Qualification Questionnaire. A document asking the tenderer to provide information about their business and experience. Used in EU level procurements.

Procurement

The process of the acquisition by the Council of the goods, services and works that it needs to deliver its services.

Quotation

An offer by a supplier to supply goods or services or to carry out works requested either orally or in writing.

Regulations

The Public Contracts Regulations 2006 and 2015 that implement the various EU Procurement Directives

SME

In this context, Small and Medium businesses.

Source Cambridgeshire

An advertising portal to bring together buyers and suppliers making it easier for businesses to find out about new procurement opportunities

Specification/Statement of Requirements

A description of the requirements for the service, supply or works to be provided.

Supplier/Service Provider

Other words for “Contractor”.

Tender

The offer submitted by the tenderer in response to the Invitation to Tender.

VFM

Value for money

Cambridge City Council Equality Impact Assessment

Completing an Equality Impact Assessment will help you to think about what impact your strategy, policy, plan, project, contract or major change to your service may have on people that live in, work in or visit Cambridge, as well as on City Council staff.



The template is easy to use. You do not need to have specialist equalities knowledge to complete it. It asks you to make judgements based on evidence and experience. There are guidance notes on the intranet to help you. You can also get advice from Suzanne Goff, Strategy Officer on 01223 457174 or email suzanne.goff@cambridge.gov.uk or from any member of the Joint Equalities Group.

1. Title of strategy, policy, plan, project, contract or major change to your service:

Procurement Strategy April 2015 - March 2018

2. What is the objective or purpose of your strategy, policy, plan, project, contract or major change to your service?

The Strategy sets out the Council's approach to procurement during the strategy period. It identifies the main objectives for the procurement function going forward

3. Who will be affected by this strategy, policy, plan, project, contract or major change to your service? (Please tick those that apply)

Residents

Visitors

Staff

A specific client group or groups (please state):

Contracts and Suppliers that are interested in bidding for Council contracts

4. What type of strategy, policy, plan, project, contract or major change to your service is this? (Please tick)

New

Revised This Strategy follows on from the 2012-15 document

Existing

5. Responsible directorate and service

Directorate: Business Transformation

Service: Legal

6. Are other departments or partners involved in delivering this strategy, policy, plan, project, contract or major change to your service?

No

Yes (please give details):

The various contracting departments throughout the Council will continue to be involved in the delivery of the Council's strategy in two stages. Firstly by applying the Strategy objectives and principles in procurements carried out and subsequently in the management and monitoring of the contracts that are put in place

7. Potential impact

Please list and explain how this strategy, policy, plan, project, contract or major change to your service could **positively** or **negatively** affect individuals from the following equalities groups.

When answering this question, please think about:

- The results of relevant consultation that you or others have completed (for example with residents, people that work in or visit Cambridge, service users, staff or partner organisations).
- Complaints information.
- Performance information.
- Information about people using your service (for example whether people from certain equalities groups use the service more or less than others).
- Inspection results.
- Comparisons with other organisations.
- The implementation of your piece of work (don't just assess what you think the impact will be after you have completed your work, but also think about what steps you might have to take to make sure that the implementation of your work does not negatively impact on people from a particular equality group).
- The relevant premises involved.
- Your communications.
- National research (local information is not always available, particularly for some equalities groups, so use national research to provide evidence for your conclusions).

(a) Age (any group of people of a particular age, including younger and older people – in particular, please consider any safeguarding issues for children and vulnerable adults)

The Strategy requires the procuring officers to fulfil the duty imposed on local authorities by the Public Services (Social Values) Act 2012. Depending on the nature of the social value requirements built into each procurement exercise some age groups could be positively impacted.

Individual, procurement specific EQIAs will be carried out for most major procurements that will be undertaken during the strategy period.

The requirement for services and works contractors to pay at least the national Living Wage to contract (and sub-contract) staff working on Council premises will provide a degree of protection for people that are currently earning less than the Living Wage.

We do not consider that anything in the Procurement Strategy will negatively affect any group or person by reason of their age.

(b) Disability (including people with a physical impairment, sensory impairment, learning disability, mental health problem or other condition which has an impact on their daily life)

The Strategy requires the procuring officers to fulfil the duty imposed on local authorities by the Public Services (Social Values) Act 2012. Depending on the nature of the social value requirements built into each procurement exercise some people with a disability could be positively impacted.

Individual, procurement specific EQIAs will be carried out for most major procurements that will be undertaken during the strategy period.

The requirement for services and works contractors to pay at least the national Living Wage to contract (and sub-contract) staff working on Council premises will provide a degree of protection for people that are currently earning less than the Living Wage.

We do not consider that anything in the Procurement Strategy will negatively affect any group or person by reason of their disability.

(c) Gender

The Strategy requires the procuring officers to fulfil the duty imposed on local authorities by the Public Services (Social Values) Act 2012. Depending on the nature of the social value requirements built into each procurement exercise some people with a disability could be positively impacted.

Individual, procurement specific EQIAs will be carried out for most major procurements that will be undertaken during the strategy period.

The requirement for services and works contractors to pay at least the national Living Wage to contract (and sub-contract) staff working on Council premises will provide a degree of protection for people that are currently earning less than the Living Wage .

We do not consider that anything in the Procurement Strategy will negatively affect any group or person by reason of their gender.

(d) Pregnancy and maternity

The Strategy requires the procuring officers to fulfil the duty imposed on local authorities by the Public Services (Social Values) Act 2012. Depending on the nature of the social value requirements built into each procurement exercise some people with a disability could be positively impacted.

Individual, procurement specific EQIAs will be carried out for most major procurements that will be undertaken during the strategy period.

The requirement for services and works contractors to pay at least the national Living Wage to contract (and sub-contract) staff working on Council premises will provide a degree of protection for people that are currently earning less than the Living Wage .

We do not consider that anything in the Procurement Strategy will negatively affect any group or person by reason of their being a mother (or father) or pregnant.

(e) Transgender (including gender re-assignment)

The Strategy requires the procuring officers to fulfil the duty imposed on local authorities by the Public Services (Social Values) Act 2012. Depending on the nature of the social value requirements built into each procurement exercise some people with a disability could be positively impacted.

Individual, procurement specific EQIAs will be carried out for most major procurements that will be undertaken during the strategy period.

The requirement for services and works contractors to pay at least the national Living Wage to contract (and sub-contract) staff working on Council premises will provide a degree of protection for people that are currently earning less than the Living Wage .

We do not consider that anything in the Procurement Strategy will negatively affect any group or person by reason of their gender assignment or re-assignment

(f) Marriage and Civil Partnership

The Strategy requires the procuring officers to fulfil the duty imposed on local authorities by the Public Services (Social Values) Act 2012. Depending on the nature of the social value requirements built into each procurement exercise some people with a disability could be positively impacted.

Individual, procurement specific EQIAs will be carried out for most major procurements that will be undertaken during the strategy period.

The requirement for services and works contractors to pay at least the national Living Wage to contract (and sub-contract) staff working on Council premises will provide a degree of protection for people that are currently earning less than the Living Wage .

We do not consider that anything in the Procurement Strategy will negatively affect any group or person by reason of their being married or in a Civil Partnership.

(g) Race or Ethnicity

Individual, procurement specific EQIAs will be carried out for most major procurements that will be undertaken during the strategy period.

(h) Religion or Belief

The Strategy requires the procuring officers to fulfil the duty imposed on local authorities by the Public Services (Social Values) Act 2012. Depending on the nature of the social value requirements built into each procurement exercise some people with a disability could be positively impacted.

Individual, procurement specific EQIAs will be carried out for most major procurements that will be undertaken during the strategy period.

The requirement for services and works contractors to pay at least the national Living Wage to contract (and sub-contract) staff working on Council premises will provide a degree of protection for people that are currently earning less than the Living Wage.

We do not consider that anything in the Procurement Strategy will negatively affect any group or person by reason of their religion or belief.

(i) Sexual Orientation

The Strategy requires the procuring officers to fulfil the duty imposed on local authorities by the Public Services (Social Values) Act 2012. Depending on the nature of the social value requirements built into each procurement exercise some people with a disability could be positively impacted.

Individual, procurement specific EQIAs will be carried out for most major procurements that will be undertaken during the strategy period.

The requirement for services and works contractors to pay at least the national Living Wage to contract (and sub-contract) staff working on Council premises will provide a degree of protection for people that are currently earning less than the Living Wage .

We do not consider that anything in the Procurement Strategy will negatively affect any group or person by reason of their sexual orientation.

(j) Other factors that may lead to inequality – in particular – please consider the impact of any changes on low income groups or those experiencing the impacts of poverty (please state):

Low Income and Poverty

Social Value outcomes and priorities can focus where appropriate on those groups in Cambridge that are in the highest need – often those groups that are on the lowest income.

The requirement for contractors that have staff working on Council premises to pay those staff at least the National Living Wage is one measure that the Council can take to address the needs of those on the lowest incomes.

8. If you have any additional comments please add them here

9. Conclusions and Next Steps

- If you have not identified any negative impacts, please sign off this form.
- If you have identified potential negative actions, you must complete the action plan at the end of this document to set out how you propose to mitigate the impact. If you do not feel that the potential negative impact can be mitigated, you must complete question 8 to explain why that is the case.
- If there is insufficient evidence to say whether or not there is likely to be a negative impact, please complete the action plan setting out what additional information you need to gather to complete the assessment.

All completed Equality Impact Assessments must be emailed to Suzanne Goff, Strategy Officer, who will arrange for it to be published on the City Council's website.
Email suzanne.goff@cambridge.gov.uk

10. Sign off

Name and job title of assessment lead officer: Deborah Quincey, Strategic Procurement Adviser

Date of completion: February 2015

Date of next review of the assessment: January 2018

Action Plan

Equality Impact Assessment title:

Date of completion:

Equality Group	Age
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Disability
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Gender
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Pregnancy and Maternity
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Transgender
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Marriage and Civil Partnership
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Race or Ethnicity
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Religion or Belief
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Equality Group	Sexual Orientation
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	

Other factors that may lead to inequality	
Details of possible disadvantage or negative impact	
Action to be taken to address the disadvantage or negative impact	
Officer responsible for progressing the action	
Date action to be completed by	