

Report to the Ethical Standards and Member Development Committee

12 March 2021

Subject:	Update on the progress, advised launch and rollout of the new MyCouncillor Member Portal
Director:	Director of Law and Governance and Monitoring Officer – Surjit Tour
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1 Recommendations







- 1.1 That the Committee agree the MyCouncillor Portal can be launched via a rollout, and to agree governance and reporting arrangements outlined in this report.

2 Reasons for Recommendations

- 2.1 For the Ethical Standards and Member Development Committee to agree a first release of, and phased rollout of, the new 'My Councillor' portal. To also agree the governance and reporting arrangements that are outlined in this report.



2 How does this deliver objectives of the Corporate Plan?

		Elected Members who have the requisite skills, knowledge and understanding of the new My Councillor portal will subsequently have a significant impact upon their role, resulting in positive implications for Corporate Plan delivery objectives.
		
		

4 Context and Key Issues

- 4.1 Following a demonstration at a cabinet workshop in December 2019, Directors and Cabinet Members approved a portal platform and new way of working.

It should be noted that the design was originally based on 26 key requirements members had requested from a portal at the outset of the Member Development Programme (MDP) in early 2019.

Key Benefits of the MyCouncillor Portal for Elected Members

- 4.2 There are a number of reasons why the new portal will demonstrably assist members if utilised fully. These include:
- It is a personalised portal for members, integrated currently with CMIS and links direct to their profile, which provides relevant information to that member e.g. a full range and comprehensive calendar of meetings and a list of personal committee membership
 - It has a fully auditable in-built casework management system that
 - Directs enquiries to the correct council officer based on their categorisation and facilitates communication with their caseworker to request and receive updates
 - Provides councillors with visibility of the progress of casework provides automated emails to prompt of key progress updates



- Automates the prompting of senior management when casework breaches Service Level Agreement timescales and allows Members to escalate casework responses that are deemed unsatisfactory for further investigation by a senior manager
- It allows councillors to report more simple, transactional casework on behalf of constituents using MySandwell services, providing both them and their constituents automated email updates on the progress and completion of reported issues
- It provides insights to councillors about their own casework to help them to understand casework trends and demands
- It allows elected members to access information and tools that are relevant to their ward and key to helping perform their roles as local representatives more effectively and efficiently. Examples include local ASB incidents, crime maps, roadworks and planning applications
- A section is accessible containing useful links to numerous Council directorates and their service areas
- It can provide detailed reporting and analytics to support improved performance management in how council services respond to casework as well as the required insights to accurately respond to external enquiries e.g. FOI requests

Planning, Design and the Portal Pilot

- 4.3 One of the key priorities emerging from the Personal Development Plan (PDP) analysis for Member Development Programme phase two was the focus on learning, understanding, confidence and support requirements for members to fully utilise the new 'MyCouncillor' portal when launched. A series of portal demonstrations took place with members during 2019 and prior to the pandemic which had informed the design stage ahead of a pilot. Progress was temporarily delayed as officers were redeployed to assist with the Council's response to the pandemic. In September 2020, a pilot group of 14 elected members was established. This pilot group contained individuals with varying IT capability levels who were encouraged to participate in order to make it as representative as possible. The design stage had involved extensive system build, process and procedural arrangements with key services etc. ahead of the pilot.



Officers from the Council's Digital Transformation Team worked closely with Civic and Member Services to produce appropriate training guides and videos which were available for pilot members to access throughout the pilot that commenced on Monday 5 October 2020 and was concluded later than originally scheduled on Friday 27 November 2020.

The rationale for the pilot extension was as follows:

- The take-up by some of the pilot members at the beginning of the pilot was a little slow, meaning only a small number of members and services used the product in the first two weeks.
- Those members who actively engaged with the portal in those first few weeks helped to root out a number of technical configuration issues and user errors. For example, at the mid-point stage of the pilot, 77% of issues raised by pilot members had been resolved so it was important members had an extended opportunity to use the product with the improvements made following this initial feedback.
- There had been quite limited feedback from officers, so extending the pilot gave an opportunity to push for more feedback during the closing weeks.
- Although there had been over 80 counts of feedback from members for the 'Raise a new Case' functionality, we had not received feedback from members regarding any of the other functionality the portal offers. Extending the pilot, therefore, provided the opportunity for more feedback on the wider functionality
- It should be noted, the average review left by members rose from 3 out of 5 stars as at 20 October 2020, to 4 out of 5 stars as at 16 November 2020 which reflects the improvements in functionality accomplished during the pilot phase



Examples of changes that were developed during the pilot, in response to issues raised by users were:

- Direct link to the MyCouncillor Portal added to the desktop for those with corporate devices
- Pilot Members have the ability to change their default web browser to Google Chrome – a more modern internet browsing experience and optimise all of the available functions
- Added Missed bin collections, Grit bins and Blocked Drains to the 'Report-It' section of the portal, allowing councillors to report more simple transactional services on a constituent's behalf via MySandwell
- Added new service categories in 'Raise a new Case' so councillors can direct enquiries to Welfare Rights & Environment services (i.e. pest control)
- Identified and addressed gaps in ways to report issues relating to overgrown trees
- Changes to the ASB overview provided by councillors of issues in their wards
- Numerous bug fixes and improvements to processes, email content and process wording to improve the user experience

Examples of enhancements to the portal carried out post pilot include:

- Improved casework insights in new dedicated area of the portal
- Improved functionality to help services manage the impact of annual leave on councillor responses
- Improvements to email contact and prompts for both officers and councillors
- Improvements to monitoring and management of safeguarding issues where they are raised by councillors
- Inclusion of functionality to enable casework submitted to external organisations outside of the portal, to be recorded and monitored and reported on along with council casework
- Improvements to how back offices respond to multi-team enquiries



Enhancements to the portal that are still under development and will form part of a later release include:

- Improvements to the MyCasework area, filter functions and accessibility options across different devices
- Other small bug fixes that require development of the MyCouncillor Portal platform itself, rather than the processes within it

Outside of scheduled training sessions, user guides, videos, practice platforms, a digital skills analysis plus guidance, approximately 12 hours of 1-1 support has been provided to pilot members during planned 'surgeries' to assist with the portal use, talk through feedback and assistance to help understand the platform and its potential for them.

Pilot Evaluation and Timeline

- 4.4 Upon completion of the pilot, officers from the Digital Transformation Team and Civic and Member Services have analysed all feedback to consolidate key strengths and correct the vast majority of outstanding functionality issues that could not be addressed during the pilot.

This analysis includes an assessment on the level of training, advice and guidance that was required for the 14 pilot group members and the ability to respond to enquiries during that period. This has influenced rollout plans to ensure officers have the time and resource to offer quality support to members when they are initially getting used to the portal functionality.

Taking this into account and depending on timescales required to amend or add any additional functionality, it is advised to undertake a phased rollout.



Depending on timescales required to amend or add any additional functionality, it is envisaged this phased roll out could begin mid-late March, following approval at this committee, commencing with the original pilot group to re-test functionality etc. followed by tranches (see the recommended breakdown for approval below):

- Tranche One – Original pilot group (14)
- Tranche Two - Deputy Leader, Cabinet Chairs of Scrutiny, Town Chairs and Vice Chairs of Scrutiny (16)
- Tranche Three – Deputy Town Chairs, Chair of Licensing, Chair of Audit, Cabinet Advisors, Fire Authority Rep and Committee Vice Chairs (14)
- Tranche Four - All other elected members (23)
- Tranche Five – Newly Elected Members post May 2021 elections

This will be preceded by extensive training that will be tailored to the skill set of individual members.

Indicative timeline to cover the period from the end of the pilot to phased launch

4.5 The following timeline details concluded milestones and recommendations for future roll out timings. These could be subject to change if affected by the forthcoming election timetable and current pandemic.

- Pilot concluded 27 November 2020
- Lessons Learnt established, requested enhancements agreed, scoped & scheduled for development early January 2021
- Development and testing of enhancements in TEST MyCouncillor Portal & development into LIVE during February 2021
- Phased pre-portal launch training to commence for tranches one & two mid/end March 2021
- Original pilot group (tranche one) reconvened to test enhancements from mid-March 2021
- Phased portal launch commences with Tranches one & two before end March 2021



- Further training and roll-out to commence from April 2021 but will be dependent on the ongoing impact of the current pandemic plus purdah and the election schedule up to and including 6 May 2021. This could delay rollout for tranches 3 – 5 until May/June 2021

Governance of the Portal

- 4.6 One of the key elements of the One of the key elements of the MyCouncillor portal is the handling and reporting of casework, including escalation of enquiries where applicable.
- 4.7 Recent FOI enquiries relating to member's casework have established the need for all elected members to fully utilise a consistent method that is transparent and robust. It is, therefore, imperative that all members fully engage with the portal as the sole method of recording and managing their casework.
- 4.8 This needs to be reflected in reporting and governance arrangements to ensure the portal is used consistently, equitably and members do not try to circumvent the processes that will be in place with service areas at the time of rollout and a full launch.

Proposed Governance Reporting and Escalation

- 4.9 Officers from the Council's Digital Transformation Team have worked closely with Civic and Member Services to develop appropriate training guides and governance arrangements to ensure the portal is used correctly, efficiently and effectively with appropriate reporting available for review at regular intervals. Civic and Member Services will manage these governance arrangements both during, and following, completion of the full launch.

It is envisaged progress updates, including statistical and analysis reports relating to the portal's usage, will be submitted to the Cabinet Member for Resources and Core Services, Leaders' Meetings and the Ethical Standards and Member Development Committee at regular intervals throughout the year.



Member Governance

- 4.10 Outside of this reporting process, it is proposed a protocol is agreed to escalate issues relating to consistent misuse or circumvention of the portal which could place unnecessary demands and stress on service areas i.e.
- Service Areas signpost elected members to the MyCouncillor portal, in all instances, should direct attempts be made to contact them re: casework enquiries etc. via other means e.g. e-mails, phone calls, office visits
 - If Service Areas continue to receive direct contact relating to casework, they will contact Civic and Member Services to liaise with elected members and establish reasons for attempted circumvention, with a view to rectifying any portal functionality or training related issues that may have resulted in temporary system/process circumvention(s)
 - If elected members continue to contact service areas directly, rather than use the portal, with its in-built escalation process, persistent circumvention will be escalated to the Service Manager for Democracy
 - The Service Manager for Democracy will liaise with the Deputy Leader, Cabinet Member for Resources and Core Services or party whip if required to report persistent circumvention(s) and seek an appropriate resolution
 - As part of the portal's overall extensive reporting capability, detailed circumvention data will be compiled by Civic and Member Services to be submitted to a Leader's meeting at regular intervals, as well as to this committee

Officer Governance

- 4.11 Governance arrangements at an officer level are established in line with current Service Level Agreements to complete casework enquiries within agreed timeframes. This is set at up to 10 working days to respond to non-urgent casework enquiries.



- 4.12 It should be noted that Members have the facility, via the new portal, to escalate casework enquiries. This will hopefully reduce the vast majority of examples where service levels for response to casework is deemed

unsatisfactory and/or targets not met. It is envisaged progress updates, including statistical and analysis reports relating to the portal's usage, will be submitted to the Leadership Team at agreed regular intervals and on request to Directorate Management Teams.

Final reflections to note

- 4.13 It should be acknowledged a new portal of this kind, which incorporates casework management, is unlikely to satisfy the full expectations of all elected members. Such expectations will need to be managed through ongoing dialogue, understanding and patience to ensure a fair, equitable process between service areas and all elected members. It is, therefore, recommended that the MyCouncillor portal is rolled out as detailed in 3.4 and 3.5 to avoid delay and embrace this new way of working.
- 4.14 Future updates to the portal, scheduled for later this year, will include planned upgrades via the external provider Granicus, as well as internal enhancements and additional signposting to toolkits, advice, guidance and training

5 Alternative Options

- 5.1 Alternative options were considered but did not meet the 26 key requirements outlined by members for a fit for purpose portal. The MDP has been developed with Members and the purpose of the MDP is to deliver development, learning and support requirements designed and/or requested by Members themselves.



6 Implications

Resources:	The portal will involve a range of internal support provision working with external platform supplier Granicus to ensure effective ongoing enhancement and learning. The costs associated with the My Councillor portal, will be met from existing approved budgets.
Legal and Governance:	<p>An effective MyCouncillor portal will help ensure the council makes informed decisions and empower Members in undertaking their various roles.</p> <p>Members in relation to regulatory matters/functions are required to undertake specific kinds of learning and development activities, particularly relating to planning and licensing functions, ethical standards and the code of conduct and safeguarding.</p> <p>Supporting Members in their development, training and support needs strengthens the council's overall governance arrangements.</p>
Risk:	There are no such implications arising.
Equality:	The MDP will address any Equality Act implications and issues arising. Support arrangements for Members identifying any specific needs will be developed accordingly.
Health and Wellbeing:	There are no such implications arising.
Social Value	There are no such implications arising.

7. Appendices

None

8. Background Papers

None

