

## Template for Impact Assessment Level 1: Initial screening assessment

<b>Subject of assessment:</b>	<b>Customer Transformation Strategy</b>			
<b>Coverage:</b>				
<b>This is a decision relating to:</b>	<input checked="" type="checkbox"/> <b>Strategy</b>	<input type="checkbox"/> <b>Policy</b>	<input type="checkbox"/> <b>Service</b>	<input type="checkbox"/> <b>Function</b>
	<input checked="" type="checkbox"/> <b>Process/procedure</b>	<input checked="" type="checkbox"/> <b>Programme</b>	<input type="checkbox"/> <b>Project</b>	<input type="checkbox"/> <b>Review</b>
	<input checked="" type="checkbox"/> <b>Organisational change</b>	<input type="checkbox"/> <b>Other (please state)</b>		
<b>It is a:</b>	<b>New approach:</b>	<input checked="" type="checkbox"/>	<b>Revision of an existing approach:</b>	<input checked="" type="checkbox"/>
<b>It is driven by:</b>	<b>Legislation:</b>	<input type="checkbox"/>	<b>Local or corporate requirements:</b>	<input checked="" type="checkbox"/>
<b>Description:</b>	<p>The Customer Strategy supports the Mayors vision, as set out in the Council Plan priorities 2024-27 <a href="#">Council Plan   Middlesbrough Council</a>, and forms an integral part of the Council's wider Target Operating Model and overall transformational approach as set out in the Transformation Portfolio approved by Council in April 2024 <a href="#">20240424 COUNCIL Transformation of Middlesbrough Council.pdf</a>.</p> <p>Forecast expenditure for the Transformation Portfolio was set out in the Budget and Medium Term Financial Plan (MTFP) and approved by Council in March 2024 (<a href="#">budget and medium-term financial plan report.</a>) The report outlined the high level phase 1 expenditure for transformation and redundancy totalling c£26.7m over 3 years which could be capitalised under the Flexible Use of Capital Receipts (FUoCR). Transformation Governance Arrangements were subsequently approved by Executive in March 2024 <a href="#">05) 20240313 EXEC Transformation Governance Arrangements</a></p> <p>The Customer Strategy is one of a number of transformation programmes, it has an approved business case and now seeks Executive approval. It offers a brand new approach that seeks to fundamentally review, redesign, and reshape all of the Council's customer-facing and business process solutions that complements the Neighbourhood model.</p>			
<b>Live date:</b>	February 2025			
<b>Lifespan:</b>	February 25 – December 2027			
<b>Date of next review:</b>	February 2026			

Screening questions	Response			Evidence
	No	Yes	Uncertain	
<b>Human Rights</b> Could the decision impact negatively on individual Human Rights as enshrined in UK legislation?	☒	☐	☐	The Customer Transformation programme is the Council's internal approach to better engaging with residents and providing a 'single view' of our customer data and ensure the Council develops a customer centric end to end journey to provide an improved service and a streamlined customer journey across all directorates. It is linked directly to the Council plan and is part of the Council's approved transformation portfolio. It is part of the Council's wider Target Operating Model. The approach will be delivered in phases across Directorates to streamline services, create efficiencies and promotes a 'one organisation' approach to delivering customer services. It is underpinned by a clear set of design principles and key objectives and sets out how the Council will provide a comprehensive and accessible 'front door' that is appropriate to engage with all customers. It is intended to provide an improved experience for residents and will not adversely impact individuals in terms of human rights.

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\* Consult the Impact Assessment further guidance for details on the issues covered by each of these broad questions prior to completion.

Screening questions	Response			Evidence
<p><b>Equality</b>            Could the decision result in adverse differential impacts on groups or individuals with characteristics protected in UK equality law?            Could the decision impact differently on other commonly disadvantaged groups?*</p>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p>The Public Sector Equality Duty (PSED) requires that when exercising its functions the Councils must have due regard to the need to:-</p> <ul style="list-style-type: none"> <li>• eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;</li> <li>• advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; and</li> <li>• foster good relations between persons who share a relevant protected characteristic and persons who do not share it.</li> </ul> <p>In having due regard to the need to advance equality of opportunity, the Council must consider, as part of a single equality duty:</p> <ul style="list-style-type: none"> <li>• removing or minimising disadvantages suffered by persons who share a relevant protected characteristic that are connected to that characteristic;</li> <li>• taking steps to meet the needs of persons who share a relevant protected characteristic that are different from the needs of people who do not share it; and</li> <li>• encouraging people who share a protected characteristic to participate in public life or in any other activity in which participation is low.</li> </ul> <p>The Act requires that the needs of people with a disability are considered and that steps should be taken to take these into account. As this proposal relates to a service whose primary focus is on adult service users who require sheltered accommodation because of disability or frailty due to age, then this proposal is particularly relevant to the equality duties and the protected characteristics of age and disability.</p> <p>The Customer Transformation programme is the Council's internal approach to better engaging with residents and providing a 'customers centric end to end journey to provide an improved service and a streamlined customer journey across all directorates' The approach will be delivered in phases across Directorates to streamline services, create efficiencies and promotes a 'one organisation' approach to delivering customer services. It is underpinned by a clear set of design principles and key objectives and sets out how the Council will provide a comprehensive and accessible 'front door' that is appropriate to engage with all customers. It is intended to provide an improved experience for residents and will not adversely impact individuals in terms of human rights. It is intended to provide an improved experience for residents and will not adversely individuals in terms of equal rights</p>

Screening questions	Response			Evidence
<p><b>Community cohesion</b>            Could the decision impact negatively on relationships between different groups, communities of interest or neighbourhoods within the town?*</p>	☒	☐	☐	<p>The Customer Transformation programme is the Council's internal approach to better engaging with residents and providing a 'single view' of our customer data and ensure the Council develops a customer centric end to end journey to provide an improved service and a streamlined customer journey across all directorates. It is linked directly to the Council plan and is part of the Council's approved transformation portfolio. It is part of the Council's wider Target Operating Model. The approach will be delivered in phases across Directorates to streamline services, create efficiencies and promotes a 'one organisation' approach to delivering customer services. It is underpinned by a clear set of design principles and key objectives and sets out how the Council will provide a comprehensive and accessible 'front door' that is appropriate to engage with all customers. It is intended to provide an improved experience for customers and will not adversely impact individuals. It is intended to provide an improved experience for and will not adversely impact the town in terms of community cohesion</p>
<p><b>Armed Forces</b>            Could the decision impact negatively on those who are currently members of the armed forces of former members in the areas of Council delivered healthcare, compulsory education and housing policies?*</p>	☒	☐	☐	<p>The Customer Transformation programme is the Council's internal approach to better engaging with residents and providing a 'single view' of our customer data and ensure the Council develops a customer centric end to end journey to provide an improved service and a streamlined customer journey across all directorates. It is linked directly to the Council plan and is part of the Council's approved transformation portfolio. It is part of the Council's wider Target Operating Model. The approach will be delivered in phases across Directorates to streamline services, create efficiencies and promotes a 'one organisation' approach to delivering customer services. It is underpinned by a clear set of design principles and key objectives and sets out how the Council will provide a comprehensive and accessible 'front door' that is appropriate to engage with all customers. It is intended to provide an improved experience for residents and will not adversely impact individuals in terms of human rights. It is intended to provide an improved experience for residents and will not adversely impact members of the Armed Forces</p>

Screening questions	Response			Evidence
<p><b>Care leavers</b>            Could the decision impact negatively on those who are care experienced?*</p>	☒	☐	☐	<p>The Customer Transformation programme is the Council's internal approach to better engaging with residents and providing a 'single view' of our customer data and ensure the Council develops a customer centric end to end journey to provide an improved service and a streamlined customer journey across all directorates. It is linked directly to the Council plan and is part of the Council's approved transformation portfolio. It is part of the Council's wider Target Operating Model. The approach will be delivered in phases across Directorates to streamline services, create efficiencies and promotes a 'one organisation' approach to delivering customer services. It is underpinned by a clear set of design principles and key objectives and sets out how the Council will provide a comprehensive and accessible 'front door' that is appropriate to engage with all customers. It is intended to provide an improved experience for residents and will not adversely impact individuals in terms of human rights. It is intended to provide an improved experience for residents and will improve services across the Council and therefore will not adversely affect individuals who are care experienced.</p>
<p><b>Next steps:</b></p> <ul style="list-style-type: none"> <li>➤ If the answer to all of the above screening questions is No then the process is completed.</li> <li>➤ If the answer of any of the questions is Yes or Uncertain, then a Level 2 Full Impact Assessment must be completed.</li> </ul>				

<b>Assessment completed by:</b>	DI	<b>Head of Service:</b>	JS
<b>Date:</b>	18.11.24	<b>Date:</b>	18.11.24