

Agenda item No: 12

**EAST MIDLANDS IMPROVEMENT AND EFFICIENCY PARTNERSHIP BOARD
MEETING: 16th June 2009**

Report of the Director

Mosaic – Customer Insight

1. Purpose of the report
 - 1.1 To update the Board of the findings from the Local Improvement Advisors (LIA) report into Customer Insight and Research

2. Background
 - 2.1 At the meeting on 21st May 2009 the EM IEP Officer Steering Group considered the attached report and noted the requirement for added capacity across the region to enable the effective use of customer insight information. The Steering Group endorse the recommendations from the LIA report and the requirement to further shape this project.

3. Recommendations
 - 3.1 That the Board agree the recommendations from the LIA report which will further shape the Research and Intelligence project within the Economic Growth work stream for which £200,000 of capital pot funds have been received

**Chris Allison
Director EM IEP**

EAST MIDLANDS IMPROVEMENT AND EFFICIENCY PARTNERSHIP OFFICER STEERING GROUP MEETING 21st May 2009

Report of the Director

Mosaic – Customer Insight

1. Purpose of the report

To update the Steering Group of the findings from the Local Improvement Advisors report into Customer Insight and Research.

2. Background

- 2.1 At the EM IEP Board meeting held on 10 November 2008, Members identified that a number of Sub Regional Partnerships were proposing to support projects involving Experian's Mosaic software and requested that consideration be given to a regional approach. (Action item 12)

Initial action and findings:

- Initial discussion with Experian to understand their approach
 - Nearly 50% of the regions authorities had already or had committed to purchase Experians Mosaic product.
 - Experian were prepared to offer financial incentives for joined up / collaborative approaches across the region
 - Meeting held 7 January with interested local authorities.
 - Districts identified that resource capacity and resilience to interpret data was an issue
 - Licence costs are only a relatively minor part of the total cost to provide "Customer Insight"
 - Can be significant consultancy costs to aid interpretation of data
 - Centres of Excellence could include LSP partners as well as Local Authorities.
 - Products other than Mosaic could deliver similar outputs
 - Not all authorities in each sub region are engaged in the topic.
 - There are different views about the emphasis of the work as to whether this should be operationally or strategically focused
 - The issue is Customer Insight and research rather than simply Mosaic
 - A January 2009 Publication by CLG recommends (amongst others)
 - RIEPs should promote effective partnership models which integrate research.
 - Define the regional support infrastructure for local information and research
- 2.2 As a result of these findings EM IEP commissioned a Local Improvement Advisor (LIAs) Derrick Johnstone, who incidentally co-authored the CLG report above to:
- Clarify common needs
 - Identify scope for collaboration
 - Assess models for joint use and acquisition of Customer Insight packages

- Identify priorities for learning and sharing good practice
- 2.3 An extract of the recommendations from the report by the LIA are appended to this report.
3. Recommendations
- 3.1 That the recommendations from the LIA report help further shape the Research and Intelligence project within the Economic Growth work stream for which £200,000 of capital pot funds have been received

Chris Allison
Director
EM IEP

Recommendations from LIA report

Customer Insight

- **Gather and disseminate information on uses of customer segmentation tools across the region** (where there may be a role for Intelligence East Midlands). This should also cover other partners such as PCTs, Police and Fire and Rescue services, and may be extended to include preparation of case studies and a register of peer expertise
- **Provide regional workshops and training to complement sub-regional activities** – showcasing different approaches and applications of customer insight tools (not just customer segmentation models but also, eg, customer journey analysis, Circles of Need and more advanced research techniques). These should provide opportunities to explore some of the theory behind applications, eg, in social marketing and services for vulnerable and disadvantaged groups.
- **Keep infrastructure and skills needs relating to Customer Insight under review** (as part of a wider overview on R&I) (sub-regional improvement and efficiency partnership task)

Building strategic capacity

- **Offer support in reviewing needs and the best way forward in structuring sub-regional/ local approaches to developing R&I infrastructure/ skills/ capacity** (eg, through Local Improvement Advisers, peer assists)
- **Support the business case for greater investment in R&I infrastructure and capacity**, eg, through case study evidence
- **Explore with IDeA the scope for developing and piloting peer reviews of LIS/observatories** and possibly, R&I functions
- **Provide support for the preparation of Local Economic Assessments (LEAs)**, working with *emda*, considering, eg:
 - the District Council role
 - effective ways of translating encouraging LSPs to consider how best to ensure that analysis that goes into LEAs is effectively translated into action, linked to reviewing the scope and effectiveness of existing services
 - the ‘economic development footprint’ of public agencies (as employers and purchasers)
 - climate change/ sustainability dimensions

Efficiency

- **Provide support and incentives to help local authorities and their partners realise efficiency gains through collaboration.** This may relate, eg, to:
 - agreeing common requirements/ specifications and negotiating lower prices from suppliers (eg, on data systems, software and commercial datasets; joint training)
 - finding better ways to combine in undertaking common functions (eg, a ‘shared services’ concept for strategic analysis and data management; co-ordination and collaboration on requirements such as the Place Survey and housing market assessments)
- **Encourage appropriate use of ‘open source’ software and tools such as OAC and some GIS offerings**

Addressing wider skills and knowledge needs

- **Take further soundings from potential participants and partners on learning and improvement needs** which can best be met through action at a regional level. Topics are likely to include:
 - customer insight tools, techniques and research methods
 - understanding needs and service take-up amongst vulnerable groups/ disadvantaged groups
 - getting the most out of external research and consultancy
 - data presentation/ visualisation
 - data sharing
 - data analysis for improvement (service managers)
 - consultancy skills for analysts
 - data analysis for commissioners
 - evaluation (including cost/benefit; early interventions)
 - more advanced quantitative skills for analysts
- **Tailor provision where appropriate to specific themes** (especially ‘wicked issues’) is likely to be important in attracting interest – on topics such as promoting equality, tackling climate change, and reducing child poverty
- **Build relevant content into councillor and leadership provision** for councillors and senior officers builds in consideration of their role as ‘intelligent consumers’ of data and evidence
- **Encourage networking across different interest groups/ networks** (Customer Service, Research and Analysis, Performance Management, GIS, etc) as well as professions and LAA themes (children and young people, adult social care, economic development, etc)

Driving the R&I agenda at sub-regional and regional levels

- **Encourage each area (LAA/ sub-regions) to have a single focus drive priorities for R&I development:** systems, skills, opportunities for collaboration, including procurement and commissioning research and analysis against locality priorities
- **Develop means at regional level to ensure that there is more concerted leadership on *regional* priorities for research and developing the R&I infrastructure across the board** – not just, eg, on economic development
- **Give greater recognition to the LIS/Observatories Group as vehicle for linking regional and sub-regional/ local R&I agendas and priorities.**