

Cabinet

Wednesday, 13th December, 2023, 6.00 pm

Shield Room, Civic Centre, West Paddock, Leyland, PR25 1DH

Agenda

1 Apologies for Absence

2 Declarations of Interest

Members are requested to indicate at this stage in the proceedings any items on the agenda in which they intend to declare an interest. Members are reminded that if the interest is a Disclosable Pecuniary Interest (as defined in the Members' Code of Conduct) they must leave the room for the whole of that item. If the interest is not a Disclosable Pecuniary Interest, but is such that a member of the public could reasonably regard it as being so significant that it is likely that it would prejudice their judgment of the public interest (as explained in the Code of Conduct) then they may make representations, but then must leave the meeting for the remainder of the item.

3 Minutes of meeting Wednesday, 15 November 2023 of Cabinet

(Pages 5 - 10)

4 Cabinet Forward Plan

The [Notice of Executive decisions](#) is available on the website.

Items of the Cabinet Member (Customer Services and Digital)

5 Payment Strategy

(Pages 11 - 38)

Report of the Director of Customer and Digital attached.

6 Print Strategy

(Pages 39 - 62)

Report of the Director of Customer and Digital attached.

7 Exclusion of Press and Public

To consider the exclusion of the press and public for the following items of business on the ground that it involves the likely disclosure of exempt information as defined in Paragraphs 1, 3 and 4 of Part 1 of Schedule 12A to the Local Government Act 1972.

By Virtue of Paragraph 1: Information relating to any individual.
Condition:

Information is exempt to the extent that, in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

Information is not exempt if it relates to proposed development for which the local planning authority may grant itself planning permission pursuant to Regulation 3 of the Town & Country Planning General Regulations 1992(a).

By Virtue of Paragraph 3: Information relating to the financial or business affairs of any particular person (including the authority holding that information)
Condition:

Information is not exempt if it is required to be registered under-
The Companies Act 1985
The Friendly Societies Act 1974
The Friendly Societies Act 1992
The Industrial and Provident Societies Acts 1965 to 1978
The Building Societies Act 1986 (recorded in the public file of any building society, within the meaning of the Act)
The Charities Act 1993

Information is exempt to the extent that, in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

Information is not exempt if it relates to proposed development for which the local planning authority may grant itself planning permission pursuant to Regulation 3 of the Town & Country Planning General Regulations 1992(a).

By Virtue of Paragraph 4: Information relating to any consultations or negotiations, or contemplated consultations or negotiations, in connection with any labour relations matter arising between the authority or a Minister of the Crown and employees of, or office holders under the authority.
Condition:

Information is exempt to the extent that, in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

Information is not exempt if it relates to proposed development for which the local planning authority may grant itself planning permission pursuant to Regulation 3 of the Town & Country Planning General Regulations 1992(a).

**Items of the Leader of the Council and Cabinet Member
(Strategy and Reform)**

8 Shared Building Control Service

(Pages 63 - 92)

Report of the Interim Deputy Chief Executive attached.

**Items of the Cabinet Member (Planning, Business Support
and Economic Development)**

**9 Contract Award - Lead Design Consultant Penwortham
Masterplan (RIBA Stage 3-4)**

(Pages 93 - 184)

Report of the Interim Deputy Chief Executive attached.

Chris Sinnott
Chief Executive

Electronic agendas sent to Members of the Cabinet Councillors Paul Foster (Chair), Aniela Bylinski Gelder (Vice-Chair), Jacky Alty, Deborah Ashton, James Flannery, Clare Hunter, Matthew Tomlinson and Ian Watkinson

The minutes of this meeting will be available on the internet at
www.southribble.gov.uk

Forthcoming Meetings

6.00 pm Wednesday, 17 January 2024 - Shield Room, Civic Centre, West Paddock,
Leyland, PR25 1DH

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Minutes of	Cabinet
Meeting date	Wednesday, 15 November 2023
Committee members present:	Councillors Paul Foster (Chair), Aniela Bylinski Gelder (Vice-Chair), Jacky Alty, James Flannery, Clare Hunter and Matthew Tomlinson
Committee members attended virtually (non-voting):	Councillors Ian Watkinson
Officers present:	Chris Sinnott (Chief Executive), Dave Whelan (Head of Legal and Procurement) and Coral Astbury (Democratic and Member Services Officer)
Other attendees:	Councillors James Gleeson, Mary Green, Michael Green, Lou Jackson, Keith Martin, Caleb Tomlinson, Kath Unsworth, Damian Bretherton, Harry Hancock, Pete Pillinger, Phil Smith, Elaine Stringfellow and Karen Walton and (attended virtually)
Public:	0

A video recording of the public session of this meeting is available to view on [YouTube here](#)

40 Apologies for Absence

Apologies were received from Councillor Deborah Ashton.

Councillor Ian Watkinson attended the meeting via Microsoft Teams and was unable to vote.

41 Declarations of Interest

There were no declarations.

42 Minutes of meeting Wednesday, 13 September 2023 of Cabinet

Resolved: (Unanimously)

That the minutes of the last meeting were agreed as a correct record for signing by the Leader.

43 Cabinet Forward Plan

The Leader, Councillor Paul Foster introduced the forward plan and referred to upcoming decisions, particularly the budget process which would be starting soon.

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The Cabinet Member (Finance and Public Protection), Councillor Matthew Tomlinson explained that budget consultation would be organised for members alongside a member training session prior to budget Council.

Resolved: (Unanimously)

The Cabinet Forward Plan was noted.

44 South Ribble Quarter Two Performance Monitoring Report 2023-24

The Leader of the Council, Councillor Paul Foster presented a report that provided Cabinet with a position statement for the Corporate Strategy for quarter two (July-September) 2023/24.

Councillor Foster explained three issues had been raised at the Corporate, Performance and Budget Scrutiny Committee, however the overall performance of the authority was strong. There had been significant progress in a number of areas and only three areas of concern highlighted within the report.

There were some slight delays surrounding the procurement and refurbishment of Greens Dance Studio. It was now expected the project would complete in January 2024 as opposed to December 2023 due to the extensive refurbishment works needed.

An update on Leyland Town Deal would be provided in January and government officials had undertaken a visit on the project following concerns raised by the Member of Parliament (MP). The project had been praised by inspectors. Although there had been acquisition challenges on the land this had been resolved.

The Leader of the Council advised homelessness was another area of concern in the borough. He had urged the Chancellor of the Exchequer to intervene and there is an undersupply of temporary and permanent accommodation. External indications signalled the situation would get worse and government intervention was needed nationally.

Resolved: (Unanimously)

1. Cabinet notes the report.
2. The recommendations from the Corporate, Budget and Performance Scrutiny Committee are accepted.

Reasons for decision:

The Council's performance framework sets out the process for reporting progress against the objectives of the Corporate Strategy. Robust monitoring ensures that the Council continues to deliver its priorities and achieves the best outcome for residents.

Other options considered and rejected:

No other options were considered.

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45 Capital and Balance Sheet Monitoring Report Q2

The Cabinet Member (Finance and Public Protection), Councillor Matthew Tomlinson presented a report that outlined the financial position of the Council in respect of the capital programme at 30 September 2023. The report highlighted key issues and explaining key variances, and provides an overview of various elements of the Council's balance sheet as at 30 September 2023.

Councillor Tomlinson advised the projected overspend had dropped from £360,000 to £60,000. In the capital programme there was a significant amount of slippage, however this would be moved across to the next financial year. The majority of those funds were allocated to Leyland Town Deal and Jubilee Gardens. Money would still be invested but additional time was needed.

Councillor Tomlinson explained the authority remained debt free. Referring to the reserves, Councillor Tomlinson explained that some reserves were still held from the COVID business recovery fund. As the money was not ringfenced a replacement vehicles and plant programme had been established.

Councillor Foster referred to the recommendations from the Corporate, Performance and Budget Scrutiny Committee and advised that a note had gone out to all group leaders providing information on the covid recovery reserves. In his view this matter was dealt with and Cabinet would not be accepting this recommendation.

Councillor Michael Green explained that it was Scrutiny who had requested the information but they had not received it, although group leaders may have. In response, the Leader advised the briefing note will be sent out again to Group Leaders and to the Chair of the Corporate, Performance, Budget Scrutiny Committee.

Resolved: (Unanimously)

1. To approve the revised capital programme attached at Appendix A, which includes approved amendments to the programme, as detailed in point 12 of this report, since the last Capital Monitoring report was approved by Cabinet in September 2023.
2. To note the variations to the programme detailed at Appendix B.
3. To note the position in the Balance Sheet Monitoring Section of the report in respect of cash, investment and loan balances and debtors as at 30 September 2023.
4. The recommendations from the Corporate, Budget and Performance Scrutiny Committee are accepted.

Reasons for decision:

To ensure the Council's Capital Programme is monitored effectively.

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Other options considered and rejected:

No other options were considered.

46 Revenue Budget Monitoring Report Q2

The Cabinet Member (Finance and Public Protection), Councillor Matthew Tomlinson presented a report that set out the revenue and reserves forecast for 2023/24 for the Council, based on the position as at 30 September 2023.

Councillor Tomlinson outlined the report and advised of changes such as unexpected grant funding and the staff pay award. Councillor Tomlinson explained the authority had been wise to budget for a 5% increase when other authorities had budgeted for 2 or 3%. The authority would need to find additional funds but it was not the same budget pressure other authorities were facing.

There would be an overspend on the waste and refuse collection budget but this would be reprofiled next year. Another overspend was on homelessness, a small grant had been received from government but it has not helped. Councillor Tomlinson expressed his satisfaction that the Leader had written to the Chancellor with other Council Leaders to express concern at the issue as the financial position was unsustainable.

The Leader commented that the council remained in a strong position being debt free and having substantial reserves.

Resolved: (Unanimously)

1. To note the 2023/24 forecast outturn for revenue and the level of reserves based on the position as at 30 September 2023.
2. To note the virements made to and from the revenue budget during the year, as detailed in Appendix 2.
3. Recommendations 1-3 from the Corporate, Budget and Performance Scrutiny Committee are accepted.

Reasons for decision:

To ensure the Council's budgetary targets are achieved.

Other options considered and rejected:

No other options were considered.

47 Property Valuation Services Procurement

The Cabinet Member (Finance and Public Protection), Councillor Matthew Tomlinson presented a report that sought approval to engage in a joint procurement exercise with Chorley Council and Blackburn with Darwen Council to procure property valuation services for assets within the Council's portfolios.

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Councillor Tomlinson explained the joint procurement would bring best value for money and put the authority in a stronger position when going out to tender.

Resolved: (Unanimously)

1. Cabinet agrees to the procurement exercise with Chorley Council and Blackburn with Darwen Council, being a collaborative exercise.
2. Cabinet agrees to delegate authority to the Cabinet Member (Finance and Public Protection) to agree the route to contract (e.g., full tender, framework) and to agree the scoring methodology and scoring matrix.

Reasons for decision:

3. The procurement will result in a separate contract for each council's valuation requirement, however running the procurement process together will create efficiencies in officer time and cost.
4. Working with Blackburn with Darwen Council will provide access to greater resource and expertise than we currently have in house.

Other options considered and rejected:

5. Tendering for this procurement without the benefit of the joint exercise would lead to additional officer resource to deliver the tender, for the same or less competitive results.

Chair

Date

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Agenda Item 5



Report of	Meeting	Date
Director of Customer and Digital (Introduced by Cabinet Member (Customer Services and Digital))	Cabinet	Wednesday, 13 December 2023

Payment Strategy

Is this report confidential?	No
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Is this decision key?	No
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Purpose of the Report

1. Cabinet to review the proposed Payment Strategy in Appendix One.

Recommendations to Executive Cabinet

2. Cabinet to approve the Payment Strategy to be implemented at South Ribble Borough Council.

Reasons for recommendations

3. ensure that the payment methods used to transact with those using Council services are up to date and 'on demand' to meet the expectations of customers.

Other options considered and rejected

4. The Council could continue to operate without a Payment Strategy, resulting in being unable to meet the needs and expectations of those customers who prefer to use 'on demand' payment methods.

Corporate priorities

5. The report relates to the following corporate priorities:

An exemplary council	Healthy and Happy Communities
Opportunities that work for everyone	Green and clean neighbourhood

Background to the report

6. The financial industry sector is amid a significant transformation, with electronic payments being at the epicentre. Payments are becoming increasingly cashless and the need for 'on demand' services has increased. Customers can now make

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payments in an instant, from their mobile devices using a variety of methods for example via PayPal, Apple Pay, Android Pay and Pingit.

7. In 2024 the councils will make enhancements to their online presence, which will include more automation, online contact channels, a new Customer Relationship Management system, a new online forms system and exploration of single sign on.
8. Crucial to these enhancements is ensuring that payment methods used to make payment for council services are up to date and 'on demand' to meet expectations of those accessing council services.
9. The councils recognise that there are customers who are either unable or unwilling to switch to other method and will still choose to pay for their bills and services by cash or cheque. Therefore, it is important that accessible options are still available for these customers.

The strategy provides an opportunity to review all payments to the councils, including those that are currently paid on receipt of invoice. Sundry debtors is a service that provides an opportunity to create further efficiencies, through considerable time wasted in chasing unpaid invoices.

10. There are three key principles behind this policy:
 - To make transacting with customers simple and more efficient
 - Deploy improved digital payment platforms that are convenient
 - A payment upfront policy with services delivered at the point the payment is receive.
11. One objective in the strategy is to phase out cash payments and cheque payments that are made to the council offices. This does not include the Leisure Centres. Whilst the quantities of these payments are low in comparison to digital methods, on average 55 transactions per week are paid in cash, with an average value of £61.44. Cash and cheque payments are an expensive and labour-intensive payment channel in comparison to digital channels as it requires officers to cash up, cash receipt and manage the collection of the cash.
12. As the strategy is implemented, cash and cheque payments will continue to be accepted and Customer Services will work with customers to identify alternative payment methods or outlets within their community where it will be more convenient for them to make cash payments. This will be reviewed again at the scheduled strategy review point.
13. This also creates an increased security risk and accrues and additional cost of secure collection, which in 2022-2033 cost South Ribble Borough Council £2,145.72.
14. Across Lancashire, five councils have already become cashless at their Council offices. The table below details which authorities in Lancashire will currently take cash payment at their council offices:

Authority	Cash payments taken
Blackburn	No
Blackpool	Yes

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Burnley	No
Chorley	Recommended to adopt Shared Service Payment Strategy
Fylde	Yes, but not for large cash amounts or Council Tax payments
Hyndburn	Only as a last resort
Pendle	No
Preston	Depending on the service
Ribble Valley	Yes
Rossendale	No
South Ribble	Recommended to adopt Shared Service Payment Strategy
West Lancashire	No
Wyre	Yes

15. Adopting a phased approach to stopping cash payments has been considered, however, the strategy isn't to stop payments completely in relation to cash. The principle of the strategy is to encourage residents to use facilities available in the local economy to make their payments, which will allow the resources at the Civic Centre to concentrate on services delivered by the Council.
16. There are 7 outlets within 0.5 miles of the Civic Centre, the closest are:
 - a. Post Office, 66 Hough Lane, PR25 2SA
 - b. News & 95P Bargains, 127 Towngate, PR25 2LQ
17. There are 59 AllPay outlets where payment for council services could be made within South Ribble and a full list of outlets by each ward is available in Appendix Three.
18. The full strategy is available in Appendix One, with a summary of the actions required for delivery available in Appendix Two. The action plan is a working document containing non-exhaustive list of actions, that will be added to as the strategy develops.

Climate change and air quality

19. The work noted in this report does not have an impact on the Council's Carbon emissions and the wider Climate Emergency and sustainability targets of the Council.

Equality and diversity

20. Considerations should be made for those who are over 65 years of age and those who may not have English as their first language. An Equality Impact Assessment has been completed and is included in Appendix Four.

Risk

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21. Reputational Risk - On the surface, stopping taking payments at the Council's office may be perceived to be a negative action, however, the principles of the Payment Strategy is to utilise existing services within the borough who offer a service to take payments. This will open more options for those wanting to pay via cash or cheque.

Comments of the Statutory Finance Officer

22. There are clearly efficiencies to be made by directing as many people as possible to the simplest payment channels. While there need to be an understanding of the implications of each action, particularly for payment in advance, this strategy should be of overall financial benefit to the Council. Quantifying this is difficult due to the various factors and teams it spans but it should begin to have impact upon performance indicators in these areas

Comments of the Monitoring Officer

23. There are no in principle objections to what is proposed here from a legal perspective. Clearly this is the direction of travel for a number of local authorities. It would be wise to monitor how the strategy works in practice to ensure that no practical difficulties are caused.

Background documents

There are no background papers to this report

Appendices

Appendix One – The Payment Strategy

Appendix Two – Payment Strategy Action Plan

Appendix Three – A list of AllPay outlets in South Ribble, split by ward.

Appendix Four – Equality Impact Assessment for the Payment Strategy

Report Author:	Email:	Telephone:	Date:
Katrina Sykes (Customer and Digital Transformation Lead)	katrina.sykes@southribble.gov.uk	01772 625492	21/11/2023

This decision will come into force and may be implemented five working days after its publication date, subject to being called in in accordance with the Council's Constitution.

Payment Strategy 2024-2027

October 2023
Version 1.0



WORKING TOGETHER

Document History

Version

Name	Role	Review Date	Version
Katrina Sykes	Customer and Digital Transformation Lead	31/10/2023	1.0

Contents

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1. Executive Summary

- 1.1 The financial services industry is amid a significant transformation, accelerated by the COVID-19 pandemic. And given the key role digitisation plays in the financial lives of more and more of the world's population, electronic payments are at the epicentre of this transformation.
- 1.2 Payments are becoming increasingly cashless, and the industry's role in fostering inclusion has become a significant priority. Payments also are supporting the development of digital economies and are driving innovation.
- 1.3 In their Joint Digital Strategy, Chorley and South Ribble Councils' have committed to providing accessible digital services that enhance the customer experience through maximising technology. A significant number of contacts to the council are from customers who simply wish to make a payment for a service.
- 1.4 This document defines Chorley and South Ribble Councils' Payment Strategy 2024-2027
- 1.5 This strategy sets the framework and direction for the next 3 years for how customers will transact with the councils. It outlines how the councils' customers and businesses will pay for services and how the councils will respond to advancements in technology. Key principles and targets have been identified and the approach the councils will take to achieve those targets.
- 1.6 The payment strategy is a road map the councils will follow to enhance the customer experience when transacting with the councils.

2. Key Principles

- 2.1 There are three key principles behind this policy:
 - To make transacting with customers simple and more efficient
 - Deploy improved digital payment platforms that are convenient
 - A payment upfront policy with services delivered at the point the payment is received

3. Background

- 3.1 At Chorley and South Ribble Councils there are approximately 1,050,000 individual transactions per year. As the boroughs grow, the number of payment transactions

will also increase. Approximately 900,000 of those payments are made via Direct Debit.

- 3.2 In 2022-2023, of those payments made outside of Direct Debit approximately 9.4% involved a customer paying for a bill or service via the Councils' contact centres, mainly over the phone with a small amount paying in person and not via a digital or automated channel. However, most people and businesses have a bank account.
- 3.3 Using the contact centre to make payments is an expensive payment channel in comparison to the cost of payments via digital or automated channels, such as via the website, the councils' automated payments line or direct debit. Also, the council has resources in place to follow and recover payments for services that can be paid up front.
- 3.4 The councils' customers have embraced digital technologies to varying degrees. Some customers have fully embraced digital channels and would prefer to deal with the council via digital channels at every opportunity preferring not to interact with officers at all.
- 3.5 In complete contrast, there are customers who are unable to embrace technology or prefer not to and therefore rely on traditional contact channels. The councils will continue to provide these channels.

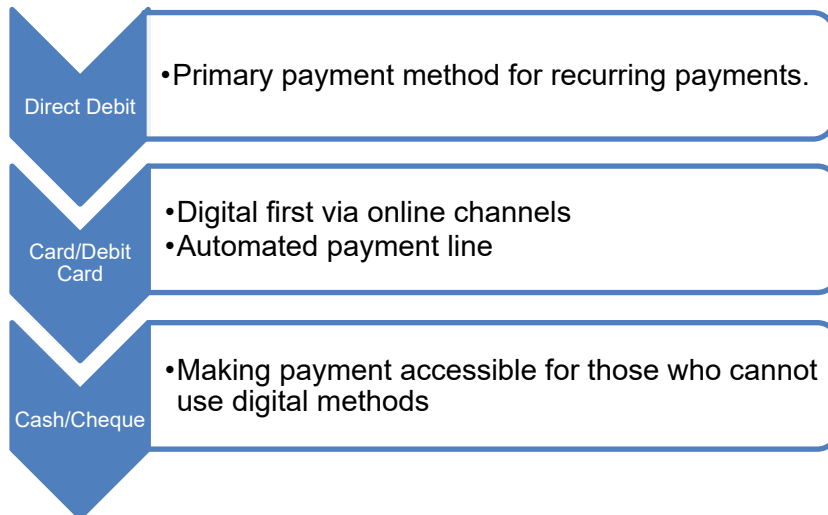
4. Objectives

4.1 The strategy is based upon the following key objectives, where the councils will:

- **encourage customers to pay for service(s) in advance and set up automated payment methods, e.g. direct debits, for recurring bills and services,** and discount this payment method where appropriate
- **substantially reduce the number of outstanding debtors to the councils** to reduce time spent chasing unpaid invoices
- **develop and enhance digital payment methods** to provide accessible on demand services that can be available instantly
- **Support and the transition for customers and businesses** to move to digital payment channels wherever possible
- no longer accept **cheque payments** through support and encourage the customer to use alternative payment methods.
- for reasons of security and transit costs the councils will phase out cash payments to the Councils Customer Services departments. Cash payments will be accepted through partner outlets.
- **provide sufficient choice of payment methods** to ensure collection rates are maximised and any customer groups are not discriminated against
- **ensure Payment Card Industry (PCI) and Data Security Standard (DSS) compliance** and that the councils access, remediate and report on their PCI compliance on an annual basis.
- partner with others to ensure community-based payment provision exists

5. Payments

5.1 The strategy aims to promote channel shift to allow digital first payments, where possible, whilst still providing accessible options for those who are unable or unwilling to pay digitally.



6. Strategy

The strategy is divided into several key elements. For each of these elements, the strategy will set out why the council intends to adopt the approach and what the council will do by 2027 to help understand how the strategy will be delivered.

6.1 Direct Debits

Aim:

Customers will be encouraged to make payments via Direct Debit. This includes shifting existing customers to these payment channels, and ensuring new customers pay by Direct Debit.

Payment by Direct Debit is the most efficient way for customers to make payment to the councils. Recurring payments both reduce customer and council effort to process transactions.

To deliver this we will:

- promote and incentivise payments via Direct Debit.
- identify all recurring payments and produce a plan to transfer these customers to automated payment methods

6.2 Digital Payment Methods

New and emerging technologies will be evaluated and those technologies which will benefit both the council and the customer will be implemented.

Aim

It is estimated that 84% of all adults in the UK have access to the smart phone or tablet and as such the need for 'on demand' services have increased. Customers can use their smart devices to make payment in a variety of ways such as PayPal, Apple Pay, Android Pay and Pingit to make transactions. These payment methods carry a relatively cheap transaction cost to the councils and allow 'on the go' payment methods which match the needs of our service users.

To deliver this we will:

- identify and review emerging technologies with a view to implementing technologies that benefit both the councils and our customers
- engage with Government Digital Service (GDS) to ensure the council tracks the developments of the 'Government as a Platform' concept and the continued development of these services including GOV.UK Pay and GOV.UK Notify
- increase the number of transactions through digital technologies

6.3 Sundry Debtors

Invoices should be minimised and if necessary should only be sent virtually and services delivered at the point the payment is received outside statutory provision.

Aim:

For a number of transactions it is currently possible for customers to receive a service from the council and pay on receipt of the service. This results in outstanding debt to the council which uses considerable amounts of officer time chasing unpaid invoices. Unless there is a statutory requirement, services will be paid for upfront and in full.

To deliver this we will:

- identify all transactions where payment will be required in advance of service
- encourage digital channels for the payment of invoices by delivering invoices digitally with a link to make payment
- review the debtor invoice management software to ensure that we are making full use of digital and automation.

6.4 Cash and Cheque Payments

Cash and cheque payments made via Customer Services will be phased out and customers will be directed to an AllPay outlet.

Aim

Paying for a bill via cash or cheque is an expensive and labour intensive payment channel in comparison with automated or digital channels and requires additional security and insurance measures.

With the shift to digital technologies, the councils have seen a decline in the number of payments being made by cash and cheque which in turn has increased the costs of collection using these methods. The councils recognise that there are customers who are either unable or unwilling to switch to other method and will still choose to pay for their bills and services by cash or cheque.

For these customers, the councils will engage with partners to enable payments for example via the Allpay and Post Office network. There are over 100 sites across Chorley and South Ribble that are one of these outlets. Using an Allpay outlet is more convenient and accessible (i.e. open longer hours than the council reception desk) and will accept payment for council services by cheque, cash and credit/debit cards.

To deliver this we will:

- divert customers visiting the council offices to the nearest Allpay outlet
- review and develop a QR code generator that will allow a QR code to be generated to make payment for ad-hoc services

6.5 Payment Card Industry (PCI) Data Security Standard (DSS) compliance

The adoption of consistent technical and operational data security requirements to ensure PCI DSS compliance and to protect the card holder.

Aim

Should the council suffer a card data breach and is not PCI compliant it would be liable for any fraudulent activity, the costs of reissuing and monitoring affected cards and any investigation costs imposed by our acquiring bank

To deliver this we will:

- ensure PCI DSS compliance of existing payment methods
- ensure the councils assesses, remediates and reports their PCI compliance on an annual basis

6.6 Channel Shift

Support and educate our customers to move to digital payment channels wherever possible, throughout delivery of the strategy, including those payments that are taken by council officers by telephone.

Aim

To promote the roll out of digital technologies and increase uptake in these channels to enhance the customer experience. To reduce the number of payments that require officer intervention.

To deliver this we will:

- encourage customers to use alternative methods that are personalised, flexible, cost-efficient, save customers time and allow the customer to transaction how, when and where they like
- continue to work with our partners to develop and publicise community hubs in libraries and other locations across the boroughs where customers can access the internet and support to self-serve and make payments
- continue to deliver digital inclusion training in the community and maintain its commitment and support to assist customers where appropriate
- deliver a communications programme to promote digital payment methods and their benefits to both the customer and the council

Payment

Task No	Task Title	Owner
1	Direct debit sign up campaign - Ctax	KS/DB/Comms
2	Direct debit sign up campaign - NNDR	KS/DB/Comms
3	Direct debit sign up campaign - Garden Waste	KS/Comms
4	Identify all recurring payments	KS/Finance
5	Work with service areas and comms to create Direct Debit sign up campaigns for all indentified recurring payments	KS
6	Review alternative technologies for collecting payments - PayPal, Apple/Andriod Pay, Pingit, Gov.Pay	KS/ICT
7	Identify all transactions where payment will be required in advance of service	KS/Sundry Debtors/Finance
8	Review the debtor invoice management software to ensure that we are making full use of digital and automation.	KS/Sundry Debtors/Finance
9	Develop a QR code generator that will allow a QR code to be generated to make payment for ad-hoc services	ICT
10	Divert customers visiting the council offices to the nearest Allpay outlet	Customer Services
11	Assessment of PCI DSS compliance	ICT
12	Create a comms programme to promote digital payments methods	KS/Comms
13		
14		

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Bamber Bridge East	2412 Trident Retail Limi Bargain Booze Plus, 383 Station Road, PR5 6EJ	Siva A & P Convenience Store, 5 Station Road Bamber Bridge, Preston, PR5 6QR	One Stop, 383 Station Road, Preston, Lancashire, PR5 6EJ	Best One, 9-11 Poplar Avenue, Bamber Bridge, Preston, PR5 6JJ	Post Office, 1 Cottonmill Road, Bamber Bridge, PR5 6LF	Spar, 133-135 Station Road, Bamber Bridge, PR5 6QS
Bamber Bridge West	All Stars Londis 320 Station Road, PR5 6EH	M And J Convenience Store 190 Station Road, Bamber Bridge, PR5 6TP	School Lane Convenience, 42 School Lane Bamber Bridge,			
Broad Oak	Post Office, 244A Cop Lane, Penwortham, PR1 9AB					
Broadfield	Brindles, 65 School Lane, PR25 2TU	Bargain Booze 1491, 81 Leyland Lane, PR25 1	Spar, 11 Broadfield Drive, Leyland, Lancashire, PR25 1GJ	Singh Stores, 103-105 Bannister Drive, Leyland, Lancashire, PR25 2GD	Costcutter, 65-67 School Lane, Leyland, Lancashire, PR25 2TU	Post Office, 11-15 Broadfield Drive, PR25 1GJ
Buckshaw and Worden	Post Office, 2 Church Road, PR25 3EJ	BP Matrix, Dawson Lane Buckshaw Village, Chorley, Lancashire, PR7 7NA	Shell Leyland, Wigan Road, Leyland, Lancashire, PR25 5UD			
Charnock	Post Office, Penwortham Lane, 222 Leyland Road, Penwortham, PR1 9TA					
Coupe Green and Gregson Lane	Post Office, 8 Alder Lane, Hoghton, PR5 0AD	Londis, 222 Hoghton Lane Hoghton, Preston, Lancashire, PR5 0JH				
Earnshaw Bridge	S & d convenience store, 256-258 Leyland Lane, Leyland, PR25 1XL					
Farrington East	Morrisons Daily, 1-5 Clifton Parade, Farington, Leyland, Lancashire, PR25 4YU	Faringtons Grocers, 68 Stanfield Lane, Farington, Leyland, Lancashire, PR25 4GA	Post Office, 1-5 Clifton Parade, Bristol Avenue Farrington, PR25 4YU			
Farrington West	Spar, 2-3 Victoria Terrace Lostock Hall Preston, Lancashire, PR5 5RX	Post Office, 2-6 Victoria Terrace, Lostock Hall, PR5 5RX				
Hoole	Spar, 108 Liverpool Old Road Walmer Bridge, Preston, Lancashire, PR4 5GE	Co-op - Pope Lane, 67 Pope Lane, Preston, Lancashire, PR1 9BY	Much Hoole Village Shop, 2 Smithy Lane, Much Hoole, PR4 4GN			
Howick and Piory	Spar Lawrence & Hunt, 40b Liverpool Road Penwortham, Preston, PR1 0DQ					
Leyland Central	Asda, 171 Towngate, Leyland, Lancashire, PR25 2TE	Post Office, 66 Hough Lane, PR25 2SA	News & 95P Bargains, 127 Towngate, PR25 2LQ			
Longton and Hutton West	Spar, 58-60 Liverpool Road Longton, Preston, Lancashire, PR4 5PB					
Lostock Hall	Spar Lostock Hall, 148-152 Brownedge Road Lostock Hall, Preston, PR5 5AE	Co-Op - Lostock Hall, Watkin Lane Lostock Hall, Preston, Lancashire, PR5 5RE	Booze Stop Convenience, 96 Watkin Lane Lostock Hall, Preston, Lancashire, PR5 5HB	Kwik Shop News And Booze, 43-45 Linden Drive, Lostock Hall, PR5 5AR	Bargain Booze. 101 Brownedge Road, PR5 5AB	
Middleforth	BP Middleforth S/Stn, 138 Leyland Road Penwortham, Preston, Lancashire, PR1 9QD	Spar, 8 Hawkurst Road, Penwortham, Preston, Lancashire, PR1 9QR	Laxmi Retails, 39A Leyland Road, Penwortham, PR1 9QH			
Moss Side	Co-Op - Leyland, Dunkirk Lane, Leyland, Lancashire, PR26 7SN	Post Office, Moss Side Community Centre, Dunkirk Lane Moss Side, PR26 7SN				
New Longton and Hutton East	Thoroughgoods, 101 Liverpool Road, Hutton, PR4 5SN	Post Office, 1 Station Road, New Longton, PR4 4LL				
Salmesbury and Walton	BP Walton, Victoria Road Walton-le-Dale, Preston, PR5 4BA	Our Choice Newsagents Lim, 352-354 Higher Walton Roa, Higher Walton, PR5 4HT	Post Office, 352 Higher Walton Road, Higher Walton, PR5 4HT			
Seven Stars	Morrisons Daily, Unit 1 Royal Avenue, Leyland, Lancashire, PR25 1BX	Spar Leyland, 341-343 Leyland Lane, Leyland, Lancashire, PR25 1UP	Post Office, 343 Leyland Lane, PR25 1UP			
St Ambrose	Premier, 41 Moss Lane, Leyland, PR25 4XA					
Walton-le-Dale East	TOP Shop Preston Ltd, 1 Severn Drive Walton- le-Dale, Preston, PR5 4TD					
Walton-le-Dale West	Spar Sandringham Rdm 3 Sandringham Road Walton-le-Dale, Preston, Lancashire, PR5 4QN	Post Office, 3-5 Sandringham Road, Walton- Le-Dale, PR5 4QN	Bargain Booze, Chorley Road, Walton-Le-Dale, PR5 4JN			

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Impact Assessment (IA)

Name of the project, policy, service, or strategy:	Payment Strategy		
Responsible officer:	Katrina Sykes		
Service Lead:	Asim Khan – on behalf of Head of ICT		
Date of assessment:	17/11/2023	Date of review:	01/06/2024



Introduction

Overview

What is an Impact Assessment?

The Impact Assessment is a tool to ensure that any policy, project, strategy, or service is assessed to consider any positive or negative impacts for all our residents with regards to equalities, health and sustainability. It is important that this is done in a timely manner and ideally it should precede the start of the project, policy or strategy concerned at Chorley Council or South Ribble Borough Council.

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Why do we need to do Impact Assessments?

As Councils, we are committed as community leaders, service providers, and employers. Therefore, we will work to ensure that everybody is afforded equality of opportunity and good life chances. The Impact Assessment is a tool we use to ensure that we fulfil these commitments and thus meet our legal duties.

Instructions

Quick steps for completion

Follow the quick steps below when completing the Impact Assessment:

1. Sections: There are three sections to the Impact Assessment. These include:

- Equality impact: the impact on the nine equality strands, which include age, disability, sex, gender reassignment, race, religion, sexual orientation, pregnancy and maternity, and marriage and civil partnership. See the **Equality Framework**.
- Health and environmental impact: the impact on health and wellbeing as well as the environment.
- Reputational impact: the impact on the Councils' reputation and our ability to deliver our key priorities. Reference should be made to the Corporate Strategies.

2. Rating and evidence: Each section has a number of questions that should be given a rating and evidence given for why the rating has been selected. This allows us to quantify the impact. The rating key is outlined below:

Code	Description
P	Positive impact
N	Negative impact
NI	Neutral impact

3. Actions: Once a rating is given, actions should be identified to mitigate any negative impacts or maximise any positive impacts of the policy, project, or strategy that is being assessed.

4. Sign off: Once the assessment is completed, sign off is required by a Service Lead.

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6. Follow up: Actions should be implemented and changes should be made to the policy, project, or strategy that has been assessed, with follow ups conducted annually to monitor progress.

Information and Support

Contact details

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Equality Impact

Area for consideration	P	N	NI	Evidence	Further action required
What potential impact does this activity have upon:					
Those of different ages?		N		<p>Findings from the Financial Lives 2020 Survey found that ‘found that around 2.4 million people aged 65 and over in the UK relied on cash to a great extent in their day-to-day life’.</p> <p>https://www.ageuk.org.uk/latest-press/articles/2021/one-in-five-older-people-rely-on-cash-for-everyday-spending/</p> <p>One of the elements of the Payment Strategy is to stop the collection of cash and cheques from the council offices. This may be viewed as a negative impact on those who prefer to pay by cash, who are generally those in the older demographic.</p> <p>Cash payments will still be possible from a greater number of outlets, however, those who attend the council offices with a cash payment would be turned away.</p>	<ol style="list-style-type: none"> 1. Identify all payment outlets within both Boroughs. 2. Upload locations of payment outlets onto both Councils’ websites. 3. A QR code generator for services where a cash payment will be available at an AllPay outlet. 4. Comms campaign to raise awareness. 5. Target comms for those who are elderly. 6. Customer Service training for officers dealing with customers wanting to make cash payments.
Those with physical or mental disability?	P			<p>The Payment Strategy positively impacts those with a physical disability as it allows them to access outlets in their local community to</p>	

				make cash payment for council services, instead of having to make inconvenient trips to the council offices simply to make a payment.	
Those who have undergone or are undergoing gender reassignment?			NI	The Payment Strategy has no direct impact on those who have undergone or are undergoing gender reassignment.	
Those who are pregnant or are parents?	P			The Payment Strategy offers multiple options of payments, including increasing the digital options and providing more services to be paid for at outlets in the community, making transacting with the Councils more straightforward.	
Those of different races?			N	It is acknowledged that in order to ensure that digital payment methods are accessible, the right translation tools are in place to support those who cannot speak English.	The website already has a translation tool in place for digital payment methods. 7. Instructions for how to use an AllPay outlet will be uploaded to the website to allow the translation tool to be used.
Those of different religions or beliefs?			NI	The Payment Strategy has no direct impact on those of different religions or beliefs.	
Those of different sexes?			NI	The Payment Strategy has no direct impact on those of different sexes.	
Those of different sexual orientations?			NI	The Payment Strategy has no direct impact on those of different sexual orientations.	

Those who are married or in a civil partnership?			NI	The Payment Strategy has no direct impact on those who are married or in a civil partnership.	
Socio-economic equality or social cohesion?			NI	The Payment Strategy has no direct impact on socio-economic equality or social cohesion.	

Health, Social and Environmental Impact

Area for consideration	P	N	NI	Evidence	Further action required
What potential impact does this activity have upon:					
Enabling residents to start well (pre-birth to 19)? <i>(Please consider childhood obesity, vulnerable families, and pregnancy care)</i>			NI	The Payment Strategy is not targeted at those who are under 19.	
Enabling residents to live well (16 to 65 years)? <i>(Please consider mental and physical wellbeing, living environment, healthy lifestyles, and improving outcomes)</i>	P			The Payment Strategy supports those who are digitally skilled by providing more digital options for transacting with the Councils.	
Enabling residents to age well (over 65 years)? <i>(Please consider social isolation, living independently, dementia, and supporting carers and families)</i>			N	<p>Findings from the Financial Lives 2020 Survey found that ‘found that around 2.4 million people aged 65 and over in the UK relied on cash to a great extent in their day-to-day life’.</p> <p>https://www.ageuk.org.uk/latest-press/articles/2021/one-in-five-older-people-rely-on-cash-for-everyday-spending/</p> <p>One of the elements of the Payment Strategy is to stop the collection of cash and cheques from the council offices. This may be viewed as a negative impact on those who prefer to pay by cash, who are generally those in the older demographic.</p> <p>Cash payments will still be possible from a greater number of outlets, however, those who attend the council offices with a cash payment would be turned away.</p>	See actions 1-6.

Natural environment? <i>(Please consider impact on habitation, ecosystems, and biodiversity)</i>			NI	No impact identified.	
Air quality and pollution? <i>(Please consider impact on climate change, waste generation, and health)</i>	P			The Payment Strategy has a positive impact on air quality and pollution because it encourages residents to make payments in their local community instead of travelling to the Council offices.	
Natural resources? <i>(Please consider the use of materials and as well as transport methods and their sustainability)</i>			NI		
Rurality? <i>(Please consider the impact of those who live in rural communities, their access to services/activities)</i>	P			The Payment Strategy has a positive impact on rurality as it encourages residents to make payments in their local community instead of travelling to the Council offices. There are 59 AllPay outlets in South Ribble and 69 AllPay outlets in Chorley and at least two AllPay outlets in all wards across both Councils meaning that everyone transacting with the councils in cash can do so within their local communities.	

Strategic Impact

Area for consideration	P	N	NI	Evidence	Further action required
What potential impact does this activity make upon:					
The Councils' reputation? <i>(Please consider impact on trust, confidence, our role as community leaders, and providing value for money)</i>		N		On the surface, stopping taking payments at the Councils' office may be perceived to be a negative action, however, the principles of the Payment Strategy is to utilise existing services within the borough who offer a service to take payments. This will open up more options for those wanting to pay via cash or cheque.	Effective communication is required to target those who are most impacted.
Our ability to deliver the Corporate Strategy? <i>(Please refer to the Strategic Objectives)</i>	P			The Payment Strategy will positively impact the delivery of the corporate strategy by allowing the Councils to provide responsive digital services, which frees up officer time to assist in the delivery on other services offered by the Councils.	

Impact Assessment Action Plan

If any further actions were identified through the Impact Assessment, then they should be listed in the table below:

Action	Start Date	End Date	Lead Officer
1. Identify all payment outlets within both Boroughs.	06/11/2023	17/11/2023	Katrina Sykes
2. Upload locations of payment outlets onto both Councils' websites.	01/12/2023	31/12/2023	Katrina Sykes
3. A QR code generator for services where a cash payment will be available at an AllPay outlet.	01/01/2024	31/03/2024	Katrina Sykes
4. Comms campaign to raise awareness	01/02/2024	Ongoing	Katrina Sykes
5. Target comms for those who are elderly.	01/02/2024	Ongoing	Katrina Sykes
6. Customer Service training for officers dealing with customers wanting to make cash payments.	01/01/2024	28/02/2024	Anne-Louise Pugh

7. Instructions for how to use an AllPay outlet will be uploaded to the website to allow the translation tool to be used.

01/12/2023

31/12/2023

Katrina Sykes

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Agenda Item 6



Report of	Meeting	Date
Director of Customer and Digital (Introduced by Cabinet Member (Customer Services and Digital))	Cabinet	Wednesday, 13 December 2023

Print Strategy

Is this report confidential?	No
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Is this decision key?	No
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Purpose of the Report

1. Cabinet to review the proposed Print Strategy in Appendix One.

Recommendations to Cabinet

2. Cabinet to approve the Print Strategy to be implemented at South Ribble Borough Council.

Reasons for recommendations

3. To ensure that the Council is leading by example in the delivery of the green agenda.
4. To ensure that communications from the Council are delivered in real time and using a digital first approach.

Other options considered and rejected

5. The Council could continue to operate without a Print Strategy, however, if the Councils are going to encourage residents to adopt a digital first approach to reduce waste, then it is important for the Council to lead by example and follow these principles.

Corporate priorities

6. The report relates to the following corporate priorities:

An exemplary council	Healthy and Happy Communities
Opportunities for everyone	Green and clear neighbourhood

Background to the report

Agenda Item 6

7. South Ribble Borough Council has declared climate emergency pledging to work to make the Borough carbon neutral by 2030. It is therefore imperative that organisational changes are made to not only champion the green agenda, but to demonstrate that our climate commitments are achieved.
8. The Chorley and South Ribble Council Joint Digital Strategy is now established to support Virtual working. All employees are supplied with the most appropriate devices for their role; new multifunctional devices have been installed with 'Follow You' printing, 'Scan to Me' and scanning directly to the line of business application; a corporate virtual mail service has also been established to enable employees to print directly from wherever they are working. This also strengthens the Councils' business continuity arrangements.
9. Customers are adopting more and more 'on demand' services and expect information to be received in real time and by methods that are more suitable to their lifestyles. This includes receiving correspondence in digital format.
10. There are three key principles behind this policy:
 - a. to ensure a set standard and hierarchy for printing and mail
 - b. to maximise efficiency and minimize environmental impact
 - c. to reduce associate cost with printing and mail
11. The Print Strategy will include a new strapline that the councils will adopt 'Be Green, Keep it on the screen.' there will be a reference to disability awareness added such as a logo to reference that exceptions will be made for accessibility purposes. The strapline will be used across all correspondence.
12. The Print Strategy provides an opportunity to review printing and mailing practice at both councils and to support physical and behavioral changes for staff and members to enable a transition to a more environmentally friendly practice. It also sets out clear parameters for communicating and sharing information with citizens including information sent by posted letter. The strategy will continue to support the wide use of digital technology to improve environmental performance.
13. The strategy impacts customers, officers and members in the following ways:

Customers	<p>Will be encouraged to share their email details with the council to be moved to email correspondence.</p> <p>Will receive correspondence digitally unless there is a statutory obligation to send via correspondence by post.</p> <p>Exceptions will be made for accessibility.</p>
Members	<p>To take the lead and sign up to email correspondence as a resident, including receiving council tax annual bills by email or online only.</p> <p>Will receive a print quota.</p> <p>Will not be supplied with printed agenda packs unless they are the committee chair, deputy chair or a have a disability requirement for print format.</p>

Agenda Item 6

	Councillor allowances and expense statements to be sent by email or available online only. Exceptions will be made for accessibility.
Officers	To take the lead and sign up to email correspondence as a resident, including receiving council tax annual bills by email or online only. Will receive a print quota Will be unable to send print correspondence unless there is a statutory requirement to do so. Exceptions will be made for accessibility.

14. Exceptions to the Print Strategy includes where there is a statutory or legal requirement to have a wet signature or printed format. Where a resident requests a printed version of their Council Tax bill for ID purposes, this will be considered.
15. The full strategy is available in Appendix One, with a summary of the actions required for delivery available in Appendix Two. The action plan is a working document containing non-exhaustive list of actions, that will be added to as the strategy develops

Climate change and air quality

16. The work noted in this report impacts on the following areas of climate change and sustainability targets of the Councils Green Agenda:
 - a. reducing waste production

Equality and diversity

17. Considerations should be made for those who are over 65 years of age, those who may not have English as their first language and those who may not own a printer. An Equality Impact Assessment has been completed and is included in Appendix Three.

Risk

18. Reputational Risk - On the surface, stopping mailed correspondence be perceived to be a negative action, however, the overall impact on the Councils reputation is expected to be positive as the Councils' will be leading the way in the Green Agenda to reduce paper waste.

Comments of the Statutory Finance Officer

18. The financial implications of this report are difficult to quantify. Costs can vary from year to year and some relate to expenditure which is often recouped via income. It is likely any reduction in spend will be gradual and seen across years rather than a sudden saving in budget.

Comments of the Monitoring Officer

19. There are no in principle issues with what is proposed here. Clearly there will be occasions when hard copy post will need to be sent out (sending out of various statutory notices) but that is allowed for in the strategy.

Agenda Item 6

Background documents

There are no background papers to this report.

Appendices

Appendix One – The Print Strategy

Appendix Two – Print Strategy Action Plan

Appendix Three – Equality Impact Assessment for the Print Strategy

Report Author:	Email:	Telephone:	Date:
Katrina Sykes (Customer and Digital Transformation Lead)	katrina.sykes@southribble.gov.uk	01772 625492	21/11/2023

This decision will come into force and may be implemented five working days after its publication date, subject to being called in in accordance with the Council's Constitution.



Print Strategy 2024-2027

September 2023
Version 1.0

Be Green, keep it on the screen



Document History

Version

Name	Role	Review Date	Version
Katrina Sykes	Customer and Digital Transformation Lead	15/09/2023	1.0

Contents

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2. Key Principles	3
3. Definitions	3
4. Scope	4
5. Background	4
6. Objectives	5
7. Strategy	5

1. Executive Summary

- 1.1 Both councils have declared climate emergency pledging to work to make the Boroughs carbon neutral by 2030. It is therefore imperative that organisational changes are made, not only to champion the green agenda, but to demonstrate that our climate commitments are achievable.
- 1.2 The Chorley and South Ribble Council Joint Digital Strategy is now established to support virtual working. All employees are supplied with the most appropriate devices for their role; new multifunctional devices have been installed with 'Follow You' printing, 'Scan to Me' and scanning directly to the line of business application; a corporate virtual mail service has also been established to enable employees to send mail directly from wherever they are working. This also strengthens the Councils' business continuity arrangements.
- 1.3 This strategy defines Chorley and South Ribble Councils' Print Strategy 2024-2027.
- 1.4 The purpose of this print strategy is to support physical and behavioral changes for staff to enable a transition to more environmentally friendly practice. It also sets out clear parameters for communicating and sharing information with citizens including information sent by posted letter. The strategy will continue to support the wider use of digital technology to improve environmental performance.
- 1.5 Key principles and targets have been identified as well as the approach the councils will take to achieve those targets.

2. Key Principles

- 2.1 The overlying principle to the print strategy is to avoid printing and instead, develop 'on screen' solutions. This supports the Chorley and South Ribble Joint Digital Strategy where the councils have focused on becoming Digital First organisations in line with the councils' green commitments.
- 2.2 There are three further key principles behind this strategy.
 - to ensure a set standard and hierarchy for printing and mail
 - to maximise efficiency and minimize environmental impact
 - to reduce associate cost with printing and mail

3. Definitions

- 3.1 The definitions below concern specific terms and descriptions used in this strategy:
 - MFD – Multi-Functional Device capable of printing, copying and scanning
 - Mono – a print in black and white
 - Duplex – double-sided printing, print is produced on both sides of paper
 - Virtual Mail – a mailing solution that allows a user to send correspondence for print without physically needing to print or post it on premise.

4. Scope

- 4.1 This strategy applies to all permanent and temporary employees at both councils as well as volunteers, people on work placements and elected members.
- 4.2 This strategy is applicable to printing from all multi-functional devices and outbound postal mail sent by both councils.
- 4.3 It impacts, residents, customers, members, officers, businesses, and anyone receiving information from the council.
- 4.4 Exceptions include where there is a statutory or legal requirement to have a wet signature or printed format.

5. Background

- 5.1 There are several components that make up the cost of printing, including the cost of MFDs, paper, ink toner, energy costs as well as the cost of lost resource due to officer time spent printing.
- 5.2 A Gartner research study in 2017 estimated that the cost of printing one mono print in duplex was 6p per A4 sheet. The table below uses this estimate to estimate the total cost of printing at both councils in 2022-2023, based on the total number of A4 sheets procured.

2022-2023	Chorley	South Ribble
A4 sheets procured	156,250	375,000
Estimated print spend based on A4 sheets spend	£9,375	£22,500

- 5.3 For mailing, there are additional costs of envelopes, postage, as well as the cost of lost resource due to officer time spent mailing, depending on the postal methods selected.
- 5.4 There are currently several ways that services can send mail at the councils, including via virtual mail, using a supplier to collect onsite and taking items to the Post Office to send via Royal Mail. The table below shows the spend on mailing at both councils in 2022-2023

2022-2023	Chorley	South Ribble
Spend on mailing	£205,258.24	£167,624.12

6. Objectives

6.1 The strategy is based upon the following key objectives, where the councils will:

- **encourage officers and members to use a digital first approach** to printing where appropriate
- **substantially reduce the number of mail items** through a digital first direct communications approach to sending written correspondence
- **introduce printing and mailing hierarchy standards** for default items
- **minimise the handling and enveloping of mail** by rolling out the virtual mail supplier to all service areas

7. Strategy

The strategy is divided into several key elements. For each of these elements, the strategy will set out why the council intends to adopt the approach and what the council will do by 2027 to help understand how the strategy will be delivered.

7.1 Digital First Approach

Aim:

The preferred method of document viewing and storage is digital. Officers and members are encouraged to only print when digital methods are not available or appropriate.

To deliver this we will:

- consider alternatives before printing or photocopying, such as display documents on screen/by projection at meetings; use approved Council systems such as Microsoft Teams and SharePoint to collaborate with colleagues on documents, reading documents on screen using desktops/laptops/iPads; scan paper documents to share them digitally with those who need copies and use mod.gov application for all meetings including council committees.
- identify areas of unnecessary printing and produce a plan to manage this
- set an ambitious target of reducing print volumes by 20% per annum over the next 3 years.
- set predefined print quotas for all staff and members

7.2 Digital First Direct Communications

Aim

Digital methods of communication will be used when writing to customers, unless there is a statutory requirement to send correspondence by paper.

Customers will be encouraged to use digital platforms and receive digital correspondence, wherever possible.

Council Tax annual billing is an area that will use pilot campaigns for digital first correspondence as uptake data is readily available. The table below indicates the distribution of annual bills across both councils in 2023.

	Chorley	South Ribble
Annual bills sent by email	2,893	2,628
Annual bills sent by letter	56,446	51,845
Total bills sent	59,339	54,473
% bills sent electronically	4.9%	4.8%

To deliver this we will:

- in the first instance only send written correspondence via email using Microsoft, GOV Notify or directly from a business application, e.g. an email from the planning portal
- encourage customers to share their email address to improve communications
- set a target of reducing mail volumes by 20% per annum over the next 3 years
- by March 2024, 25% of annual bills sent electronically
- by March 2025, 50% of annual bills sent electronically
- by March 2026, 75% of annual bills sent electronically

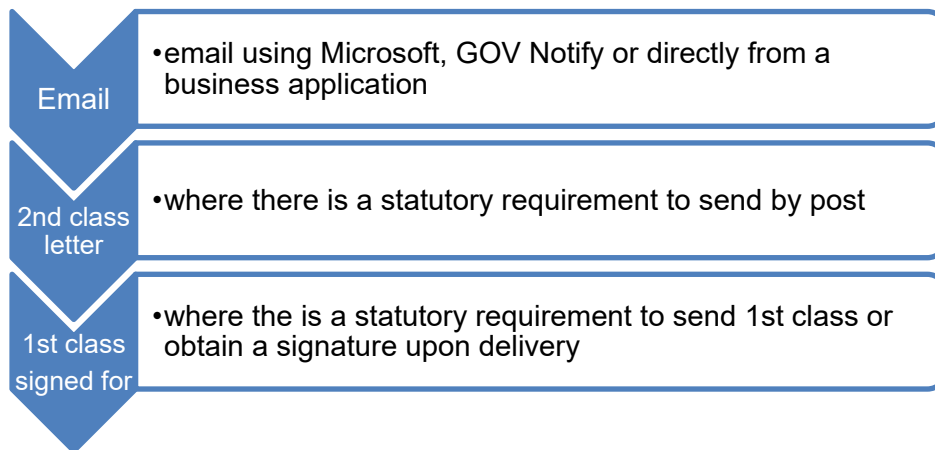
7.3 Print and Mail Standards

Aim

There are a variety of practical measures that can be taken to prevent compromise of data security, reduce printing and mailing costs, and the associated environmental impacts.

To deliver this we will:

- Adopt the following hierarchy standards when printing or using virtual mail
 - Send documents by PDF and not Word
 - Print multiple page documents as duplex
 - Use mono print, including when using the logos on printed mail
 - Print A4 where possible
 - Use a C5 envelope, 2nd class as default for mail items
- Use the below hierarchy for sending direct communications:



7.4 Virtual Mail

Aim:

A new contract with a virtual mail supplier has been procured, providing the Councils with preferential rates for mail items, which create efficiencies against on site printing methods.

All services areas will be encouraged to use the virtual mail supplier to minimise the handling and enveloping of mail.

To deliver this we will:

- create separate accounts for all service areas to manage their own virtual mail
- provide training for all service areas to use virtual mail

7.5 Engage Organisation-wide

Aim:

As an organisation championing the green agenda, we must adopt this strategy organisation wide, from officers to Senior Leadership Team and Members.

To achieve the ambitious targets outlined in this policy, every service area must work towards the goal of reducing print and mail to generate efficiencies and create environmental impact.

To deliver this we will:

- communicate the strategy effectively
- represent the Councils by leading from the front as officers and members who are also residents by adopting a digital first approach to receiving correspondence from the Councils.
- provide the right training across all levels of the organisation
- monitor and report openly on printing and mailing metrics

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Print Strategy

Task No	Task Title	Owner
1	Communicate print strategy to all officers	Heads of Service
2	Create a digital first approach for members	Dem Services
3	Member Comms	Dem Services
4	Add Print Strategy strap line to all comms	KS
5	Set up print reporting	ICT
6	Set predefined print quotas for all staff	SMT
7	Identify areas of unnecessary printing	Heads of Service
8	Create action plans with Heads of Service to reduce areas of unnecessary printing	KS
9	Define where email addresses for customers can be stored and what they can be used for	KS
10	Campaign to collect email addresses for all customers	KS/Customer Services/Comms
11	Campaign to sign up to receive annual bills electronically	KS/Customer Services/Comms
12	Create separate accounts for Service Areas with iMail Comms	KS
13	Create print folders for iMail	ICT
14	Provide training for iMail	KS
15	Set up printing/mail reporting	KS/ICT
16		

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Impact Assessment (IA)

Name of the project, policy, service, or strategy:	Print Strategy		
Responsible officer:	Katrina Sykes		
Service Lead:	Asim Khan – on behalf of Head of ICT		
Date of assessment:	17/11/2023	Date of review:	31/07/2024



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Contact details

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Equality Impact

Area for consideration	P	N	NI	Evidence	Further action required
What potential impact does this activity have upon:					
Those of different ages?		N		<p>The Print Strategy is designed to help the councils' achieve their green agendas not specifically targeting any individual age group, however, may negatively impact older residents.</p> <p>Many elderly residents prefer their correspondence to be received by letter.</p>	<ol style="list-style-type: none"> 1. Print strategy training is available to Customer Service officers which includes outlining statutory requirements print to be able to support residents who want to correspond digitally and provide the right answers to those who would continue to correspond by letter. 2. Ensure the websites are straight forward to navigate, in particular to sign up to eBilling.
Those with physical or mental disability?			NI	<p>The Print Strategy may negatively impact those who have sight difficulties who struggle to read on screen.</p>	<p>The website already has accessibility tools in place.</p> <ol style="list-style-type: none"> 3. Ensure that website accessibility tools can be used with digital correspondence.
Those who have undergone or are undergoing gender reassignment?			NI	<p>The Print Strategy has no direct impact on those who have undergone or are undergoing gender reassignment.</p>	

Those who are pregnant or are parents?			NI	The Print Strategy has no direct impact on those who are pregnant or parents.	
Those of different races?			NI	It is acknowledged that in order to ensure that digital correspondence is accessible, the right translation tools are in place to support those who cannot speak English.	The website already has a translation tool in place. 4. Ensure that translation tools can be used with digital correspondence.
Those of different religions or beliefs?			NI	The Print Strategy has no direct impact on those of different religions or beliefs.	
Those of different sexes?			NI	The Print Strategy has no direct impact on those of different sexes.	
Those of different sexual orientations?			NI	The Print Strategy has no direct impact on those of different sexual orientations.	
Those who are married or in a civil partnership?			NI	The Print Strategy has no direct impact on those who are married or in a civil partnership.	
Socio-economic equality or social cohesion?			N	The print strategy may have a negative impact on socio-economic equality as low income households may not have access to a printer, to print documents when required, for example, for ID purposes.	In exceptional circumstances, where someone wants a bill for example for ID purposes, we will consider printing.

Health, Social and Environmental Impact

Area for consideration	P	N	NI	Evidence	Further action required
What potential impact does this activity have upon:					
Enabling residents to start well (pre-birth to 19)? <i>(Please consider childhood obesity, vulnerable families, and pregnancy care)</i>			NI	The Payment Strategy is not targeted at those who are under 19.	
Enabling residents to live well (16 to 65 years)? <i>(Please consider mental and physical wellbeing, living environment, healthy lifestyles, and improving outcomes)</i>	P			The Payment Strategy supports those who are digitally skilled by providing real time correspondence to their 'on the go' devices such as mobile phones and tablets.	
Enabling residents to age well (over 65 years)? <i>(Please consider social isolation, living independently, dementia, and supporting carers and families)</i>		N		The Print Strategy may negatively impact older residents. Many elderly residents prefer their correspondence to be received by letter.	See actions 1 and 2 above.
Natural environment? <i>(Please consider impact on habitation, ecosystems, and biodiversity)</i>	P			Paper reduction prevents destruction of natural ecosystems through deforestation.	
Air quality and pollution? <i>(Please consider impact on climate change, waste generation, and health)</i>	P			Paper reduction prevents emissions of greenhouse gases through deforestation. Diverting paper waste from landfills lessens the use of fossil fuels and reduces methane gas.	
Natural resources? <i>(Please consider the use of materials and as well as transport methods and their sustainability)</i>	P			Reducing the use of paper saves trees and conserves energy used in converting those trees into paper and in transporting paper products	

<p>Rurality? <i>(Please consider the impact of those who live in rural communities, their access to services/activities)</i></p>	<p>P</p>		<p>The Print Strategy positively impacts rurality, because it allows residents to receive their communications in real time rather than waiting for post, which can take longer to deliver to rural communities.</p>	
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Strategic Impact

Area for consideration	P	N	NI	Evidence	Further action required
What potential impact does this activity make upon:					
The Councils' reputation? <i>(Please consider impact on trust, confidence, our role as community leaders, and providing value for money)</i>	P			The Print Strategy will have an overall positive impact on the Councils' reputation because it allows the Councils to lead by example as champions of their green agenda and demonstrates to residents that they are doing what is possible to meet their green targets.	
Our ability to deliver the Corporate Strategy? <i>(Please refer to the Strategic Objectives)</i>	P			Both Councils have green targets within their corporate strategies which the Print Strategy will positively impact.	

Impact Assessment Action Plan

If any further actions were identified through the Impact Assessment, then they should be listed in the table below:

Action	Start Date	End Date	Lead Officer
1. Print strategy training is available to Customer Service officers to be able to support residents who want to correspond digitally and provide the right answers to those who would continue to correspond by letter.	01/01/2024	31/03/2024	Anne-Louise Pugh
2. Ensure the websites are straight forward to navigate, in particular, to sign up to eBilling.	01/12/2023	30/06/2024	Katrina Sykes
3. Ensure that website accessibility tools can be used with digital correspondence.	01/12/2023	28/02/2024	Katrina Sykes
4. Ensure that translation tools can be used with digital correspondence.	01/12/2023	28/02/2024	Katrina Sykes

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Agenda Item 8

By virtue of paragraph(s) 1,3,4 of Part 1 of Schedule 12A of the Local Government Act 1972.

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Agenda Item 9

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