Local Digital Today

October 2013

UKAuthority

Comissioned by the Department for Communities & Local Government October 2013

'Local Digital Today' was commissioned by the Department for Communities & Local Government, researched, written and published by UKAuthority with support from the Local Government Association, Socitm, Local CIO Council, Local Government Delivery Board, Local Contact Council and LocalGov Digital.

Foreword

Brandon Lewis

Member of Parliament for Great Yarmouth
Parliamentary Under Secretary of State, Department for Communities and Local Government

Simply better for less

Councils are committed to delivering better services for less, and increasingly recognise that digital technologies have a vital role to play in helping them achieve this.

The National Audit Office has demonstrated that making public services digital first, or 'digital by default', is a vision supported by most people and businesses – and that many citizens today have both the skills and willingness to engage online. Putting local services online, rather than using face-to-face, postal or phone options, will not only deliver substantial savings to the public purse, but will also save users time and money whilst they enjoy a better service.

There is clear evidence from this research that the majority of councils are already delivering real savings from their digital endeavours. But this is only the start of the journey and there is a clear call from the frontline for leadership and knowledge sharing sector-wide in order to accelerate the rate of digital adoption.

It is essential that councils work together to deliver the ultimate goal: excellent, cost efficient digital and assisted digital services that our citizens choose to use.

I would urge digital leaders to engage the key influencers across their local public services with the digital story and help raise the digital ambition for both local service organisations and their citizens.

Local CIO Council

Local Government Delivery Council

Local Contact Council

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1. Introduction

Helen Olsen
Managing Editor, UKAuthority

Our snapshot survey of 200 senior local authority and supplier leaders, executives and decision makers clearly highlights the belief that digital technologies will play a vital role in helping councils to deliver better services to their citizens for less cost to the public purse.

Indeed, there appears to be little dissent when
it comes to acknowledging the power and potential of digital to transform service delivery.

> *"We must take care to avoid councils all developing bespoke tools. As much as possible, using widely used platforms and technologies such as the main social media networks, not trying to reinvent."*

That does not, however, mean that councils are plain sailing into a cost efficient and customer-led digital future. The harsh financial realities of today coupled with both rising citizen expectations and the rising demand on council services of an aging population mean that councils will struggle to keep pace with demand. Finding the investment funds – and breathing space – to transform services will be no easy task.

Our respondents reported significant barriers, such as integration with existing legacy systems and ICT infrastructure and lack of funds, along with the significant cultural change that will be required to move an organisation into a digital future. Half said that they would be tackling the inertia of 'unwillingness to change' from staff and colleagues.

Highlights

91% *say that Digital will help their organisation to deliver better for less*

84% *say that Digital will help citizens to interact with councils*

60% *say that Digital is already helping to deliver savings*

93% *believe that digital leadership within the organisation, and 80% say that digital leadership across local government, is key to delivering digital success*

82% *say that sharing digital best practice and experience is essential*

Barriers to success were identified as: Legacy systems & ICT infrastructure (72%), Cultural discomfort with digital change (50%) and unwillingness to change (49%)

Leadership regarding best practice and raising digital ambition across the sector will be key to successful digital transformation – respondents seem clear that this is not a desire for a 'one size fits all' approach but a need to ensure that digital services across the public sector are consistent and compatible; that the user experience will be excellent across and between services. Sharing digital assets and experience was seen as essential in order to avoid wasteful duplication and to accelerate learning.

The odds, therefore, seem high that digital will deliver significant savings and improvements in services – it will deliver better for less.

But perhaps more importantly, the rise of digital is also a win for citizens: digital will help citizens to interact with their councils, will make accessing services easier, the user journey more intuitive. It may even deliver the Holy Grail of technology in the public sector: joined up government. Much hyped and talked about since the 90s we may finally be on the digital road towards a joined up public secto0r.

And that could really transform the lives of countless families up and down the country. A digital goal well worth striving for.

2. Executive Summary

Frits Janssen
Chairman, UKAuthority

Digitally better for less

Unsurprisingly in these austere times, perceived digital benefits centred around cost savings: councils believe that digital technologies will 'Help my organisation to deliver better for less': (91.0% agree or strongly agree) and will deliver savings through enabling 'staff to work flexibly and on the move' (92.1%).

However, in a potential 'win-win' scenario, most councils also see major benefits for citizens from the deployment of digital technologies: 89.9% feel that digital would facilitate service transformation, 84.3% that it has the power to 'Make the customer journey better for our citizens' and 84.2% that it will help citizens to interact with their councils.

In one key area however, councils were far more negative - some 49.40% disagree or strongly disagree with the statement that digital technologies will 'Give equal access to all citizens'. This clearly signals that digital inclusion – or fighting digital exclusion – is an urgent problem area to be tackled and underlines the importance of developing 'Assisted Digital' access to services.

However others saw digital technologies as a potential solution to social problems. For example, they "allow people to access services better in rural areas, enabling older people to stay in their homes for longer and providing tourists with better information at the time they need it," said one respondent.

Perhaps unsurprisingly, as the purveyors of these technologies, supplier respondents were even more bullish about the potential benefits, with a full 100% agreeing or strongly agreeing that technology will 'Help front line organisations to deliver better for less' and 'Help citizens to interact with front line services'. More than nine in 10 suppliers also agreed or strongly agreed that technology will 'Make front line organisations more cost effective' (91.0%); 'Make the customer journey better for citizens' (90.9%); and 'Facilitate service transformation' (90.9%).

A successful digital approach

Strong leadership backed by a solid business case emerged as the most important element for the successful development of digital services and process according to our local government respondents. More than nine in 10 (92.7%) cited 'Digital leadership within my organisation' as important; with almost as many (85.4%) citing 'Creating a business case for any digital-led change'. Whilst by no means inviting mandation, eight in ten (80.3%) councils were clear that guidance and 'Leadership across local government about developing digital public services' was important to success.

In the past, local government has often been accused of reinventing the wheel when it comes to technology development, however respondents were clear that 'Sharing best practice and experience of developing local digital services' was important (81.9%). 'Development of an internal skilled digital resource to support and drive this work' was seen as key (83.7%) with a similar number (78.0%) citing the need to create 'A guiding digital strategy for my organisation'.

Worryingly, one factor discounted by many respondents in local government was the influence of national government's digital strategy' – it was rated as important by only half of our respondents. However, the integral links in service delivery between central and local delivery are such that there must inevitably be danger in local and central digital strategies developing in isolation – interoperation and a seamless user

Digital will…

"…allow people to access services better in rural areas, enabling older people to stay in their homes for longer and providing tourists with better information at the time they need it."

"…engage potentially disenfranchised groups in public discussion, through innovative use of social media."

experience will become 'standard' expectations for tomorrow's digital citizen.

On the practical level, one respondent said that care should be taken to "Avoid councils all developing bespoke tools. As much as possible, using widely used platforms and technologies such as the main social media networks, not trying to reinvent."

Supplier views echoed those of the council respondents. However, while every supplier respondent (100%) cited 'Digital leadership within each organisation' as important, suppliers almost all also stressed 'Leadership across local government about developing digital public services' (95.5%) and 'Sharing best practice and experience of developing local digital services' (95.5%) as important. Common-sense suggestions included: "Up to date software and hardware, common platforms, shared access to data"; and "A pragmatic approach to adoption of open standards."

"There is a transformation group for each of our strategic objectives, and 'digital' is woven into all of the transformation enquiries that each is undertaking."

Leading on the digital front line

As discussed previously, strong leadership is seen as key to digital success in front line services and heads of IT/ chief information officers are still to the fore as people leading digital services in local government. Despite 'digital' becoming ever more mainstream some 68.3% of councils said that they were leading work on digital services at their council.

However, the fact that several other job titles gained responses of more than 50% signals that even where heads of IT/CIOs are 'leading', they are often leading in conjunction with other managers, not operating on their own. The two other job titles cited most highly by councils here were 'head of customer service' (57.5%); and 'web manager' (51.9%). Said one, "A mix of these people. Like everything in local government, there is a variety of approaches and that is not a bad thing.

Surprisingly, the next highest response, cited by almost half of all council respondents (45.1%) as leading digital transformation, was the chief executive. This is encouraging, given the perceived importance of leadership highlighted elsewhere in this survey.

Interestingly,. suppliers have a different perspective on leadership: they feel that the head of customer service is most often leading on digital services (76.2%) – compared with this being only the second highest listed by councils, at 57.5%. Next highest in suppliers' view is the head of transformation, at 71.4% - again significantly more than council's assessment of the role of this job title (42.4%)

The biggest difference in perception is that suppliers feel that they themselves are playing a relatively large role in leading digital services, at some 70.0%, and external consultants a fair-sized role too, at 50%: for councils these figures were less than one fifth of this level, at 12.0% and 8.9% respectively.

Exactly two-thirds of suppliers (66.7%) do feel the head of IT/CIO plays a leading role in digital services though, a high rating, if not at the top as it was with council respondents.

Suppliers also recorded slightly lower levels of perception that digital services were being led by the web manager (33.0%); Individual service heads (25.0%); the chief executive (23.8%); head of finance (19.0%); and front line officers (15.0%).

Suppliers' perception of elected members' leadership of this agenda was also less than half of council respondents' perception (14.3%, compared with 31.9%): a sign that, to the technology supplier community, elected members have very low visibility indeed, surely not a good state of affairs.

Asked 'Should anyone else lead on digital within these organisations?' one supplier said that what was needed was "A mix of these people. Like everything in local government, there is a variety of approaches and that is not a bad thing."

Digital leadership…

"…a mix of these people. Like everything in local government, there is a variety of approaches and that is not a bad thing."

However the strongest topic of comment here was that the suppliers wanted to see more leadership of the digital agenda from the very top of local government.

Strength of a strategy

One might assume that having a coherent and logical strategy for the development and integration of digital technologies into existing service delivery infrastructures would be essential. However, only a little more than

one third (35.5%) of council respondent organisations has already created a digital strategy to guide developments. Encouragingly, however, a further 50.6% intended to create one – meaning that nearly nine in ten (86.1%) either have a strategy in place or in the pipeline.

A concerning 13.9% however reported not only that they had no strategy, but that they had no intention of creating one.

Just under three-fifths of council respondents (57.9%) agreed or strongly agreed with the statement, 'My organisation is ready to embrace the opportunities that digital brings'. This suggests there is still some way to go before the digital agenda is strongly fused with the wider senior management agenda across the whole of local government.

Supplier responses to a similar question from their perspective – 'Do you think that front line public services are ready to embrace the opportunities that digital can bring?' – were equally mixed. Two-thirds did respond in the positive – slightly higher than the 57.9% agreeing with the same question from the local government perspective - but this means that a third do not feel that front line public services are yet geared up for the digital age.

"Reduce carbon emissions, improve transport performance, reduce costs"

"Better understand our own internal performance"

"Increase staff productivity"

"Improve how we use our resources like buildings"

"Survive!"

Savings to date

According to respondents, the average percentage of individual services that are digital by default or design today is 24.8%, with the average percentage volume of digital service transactions being 37.97%. This figure was an estimate by respondents but is indicative of the digital road still to travel if frontline services are to be delivered digitally.

Most council respondents (60.4%) reported at least some savings to date generated by the use of digital technologies, but this does therefore leave almost two in five (39.1%) who say that no savings have accrued from digitisation. In the current economic climate, this is disappointing. However, responses to this section were significantly lower than other sections – suggesting that the metrics are either not in place or not to hand to readily answer such questions.

Just 16% were able to quantify these savings. Breaking down all reported savings figures above £1,500 we find the average is around £1.5m, which is appreciable. On the other hand, there is a very wide range of savings reported right up to £12m, with very few recording the same savings level. This suggests that whilst savings are never guaranteed, they are certainly there to be made.

Holding back Digital

Two factors stand at the head of the list of barriers to digital progress cited by local government: 'Legacy systems and ICT infrastructure' (72.7%) and 'Lack of development funds' (59.4%). It is surprising that legacy systems are still such a barrier to progress in the public sector, and that this is coming out as the top barrier, above even funding – but it is also indicative of the scale of technology infrastructure and investment over the years that must be integrated with new digital processes and service delivery.

"Culturally I think the emphasis so far has been on digital for communication, moving toward customer service but the organisation is still lacking understanding on potential for service transformation/delivery. I the think reasons for this are many – poor digital leadership in the organisation and across the sector, lack of empowerment for those with digital skills, embedded culture, fear of moving away from established process and supplier relationships...the list goes on!"

The next two major barriers are familiar to any local government observer over the years: 'Culturally uncomfortable for the organisation' (50.6%) and 'Unwillingness to change/non-cooperation of colleagues' (49.7%). Change is difficult for any large organisation but it is encouraging that change management is seen as an integral digital issue.

Surprisingly, 'Lack of buy in from senior management/members' is not viewed as a major barrier to progress by most councils: since it has already been established that such buy-in is viewed as vital to successful digital services, it follows that most people in local government digital services now feel such buy-in has been achieved which is a positive note.

Interestingly, barriers rated highest by suppliers were mostly different those reported by council respondents. Every supplier respondent (100%) said the fact that digitisation was "Culturally uncomfortable for the organisation" is a barrier to progress, compared with just 50.6% of council respondents. Clearly, those looking in from the outside have a different view as to the scale of a problem cultural

change might be than do those within the culture itself.

Of those barriers rated highly by suppliers legacy systems (86.4%) crosses over with the local government respondents' view of key barriers, reinforcing the seriousness of this issue. The other four barriers rated more highly than their council counterparts, however, suggest that suppliers view these issues of unwillingness to change (81.8%); inflexible procurement (77.3%); lack of leadership (76.2%); and lack of in-house digital skills (76.2%) as more serious problems than the public sector seems to realise.

Into a digital future

There is no denying the strength of feeling among respondents towards digital: it is an enabler, an opportunity for innovation that opens up new horizons in public service delivery. It also has the potential to reduce the cost of delivering those services. In these austere times digital can truly be said to offer the public sector a beacon of hope; the promise of delivering better for less.

However, strong guiding vision and leadership will be essential to truly taking advantage of this digital potential. Skills, knowledge transfer and development can be significantly speeded up and enhanced by sharing information and digital assets – for example, central government's digital principles, style guide and service design manual. All of which are ready and available for re-use today.

Tight communication across all parts of the public sector regarding digital developments, standards for sharing information and ensuring interoperability, how barriers were overcome and celebrating success, will enable collaboration on delivering 'end to end' services in the way that best makes sense for the citizen – because yes, at the end of the day the focus must always be the citizen and their user need.

"People are thinking that digital is a different way of doing what we do today. Therefore there needs to be a cost benefit analysis... Digital is different, full stop."

3. Commentary

Martin Ferguson
Director of Policy & Research, Socitm

Results of this survey arrived on my desktop just after I'd received the following in a note from an elected member about the 'e-government' push in the early noughties:

'In the majority of cases we already had the technology in place and it was the cultural / structural changes that made best use of that technology that were required!'

Similar issues persist today, according the survey findings. Two of the highest barriers to digital development cited by public sector respondents were that it was 'culturally uncomfortable for the organisation' and that those pushing the agenda faced 'unwillingness to change/non-cooperation of colleagues'. On the other hand, well over half of public sector respondents did not see 'lack of buy in from senior management/members' as a problem.

The supplier community flagged cultural/lack of buy-in barriers much more strongly. Every single respondent from the supplier community (100%) cited 'culturally uncomfortable for the organisation' as a problem for digital development, with 82% also citing 'unwillingness to change'. Significantly, they see lack of buy in to digital from senior management/members' as a much bigger issue than their public sector colleagues.

The survey makes clear that both supplier and public sector respondents put high value on leadership as a component of success with digital, with suppliers recording particularly high scores in this area. Responses from the public sector

suggest that they believe this is now in place, with nearly half saying digital was being led by the chief executive. Suppliers are again less bullish about this, with fewer than a quarter agreeing that digital transformation was being led at this level. This discrepancy may explain why suppliers are less optimistic overall about prospects for digital transformation.

Socitm's own work with local authorities on channel shift and digital transformation suggests that statements of 'digital commitment' may indeed be running ahead of activity. However, it is also the case that there is some excellent practice starting to emerge, both at a whole council and service delivery levels. We will be reporting on this in a new report in digital readiness dues out later this year.

Jos Creese
CIO, Hampshire County Council & Chair of the Local CIO Council

There is still surprisingly little data and evidence about the power of 'digital' to modernise the public sector. We all know that 'channel shift' to web transactions saves money, but it's not enough. Much more evidence exists in the private sector where digital leaders are shown to outperform their peers in every industry. Yet the public sector now depends on a shift to digital delivery wherever possible to drive out cost while protecting services.

This survey is therefore very helpful in aligning technology opportunity with business benefits in the public sector – productivity, efficiency, improved customer service, new service design.

It demonstrates why 'local' matters and that it's all about technology use, not just innovative technology.

4. The Survey

Methodology

The research project, 'Local Digital Today', was undertaken by a project team comprising UKAuthority editorial and research staff, the Department for Communities & Local Government and the members of the Local Government Digital Alliance: Local Government Association, Socitm, Local CIO Council, Local Government Delivery Board, Local Contact Council and LocalGov Digital.

The research aimed to provide insight into how and where digital technologies can help local public services to provide better services to their citizens for less.

An online survey methodology was deployed in order to give a 'point in time' perspective of how the public sector viewed this issue. The questionnaire, with a mix of quantitative and qualitative questions, was developed and tested by the project team early in the summer of 2013, with data collection undertaken among a targeted audience, focusing on English Local Government.

UKauthorITy's editorial and research database contains contacts with over 30,250 key chief and senior executives, directors and officers from central and local government, police, fire, health and ancillary services. Invitations to participate in the research programme were emailed to pre-identified individuals in 353 English Local Authorities. The team also accepted responses from Scottish or Welsh Unitary Councils that wished to participate.

These personal invitations contained a link to each individual's survey form, enabling core underlying data about organisation type, region, job function and role to be automatically collected and anonymised for analysis purposes.

A copy of the online questionnaire can be found in Appendix I.

Details of responding organisations and respondent job titles can be found in Appendix II and III respectively.

Response

Local authority organisation types responding

200 individuals submitted responses to this research. This comprised: 178 Local Authority Personnel and 22 Supplier Personnel.

BREAKDOWN OF RESPONSE BY COUNCIL TYPE:
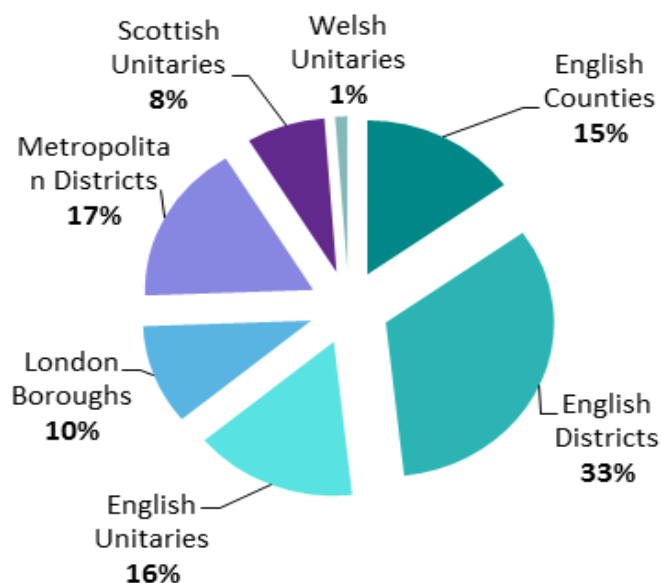
Responses were submitted by 138 unique organisations. English district councils represented the greatest numerical response, as be seen in the pie chart to the left – 33% of all respondents worked for this category of council. However, as can be seen from the chart at the top of the next page, the percentage response rate from districts was one of the lowest groups – 25.9%.

The greatest interest in the survey came from English Counties (responses from 63% of this category) and Metropolitan Districts (over half – 58.3% - of such councils participated).

PERCENTAGE OF EACH TYPE OF LOCAL AUTHORITY RESPONDING TO THE SURVEY
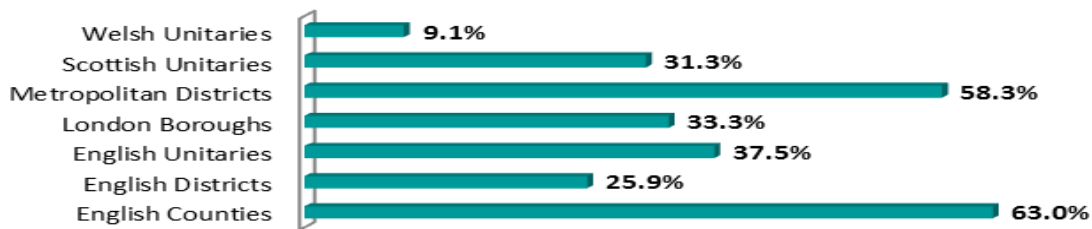
Local authority seniority and role

It was notable that over one third (37%) of the sample came from the 'top' level of the organisations' officers: chief executives, members, assistant chief executives, directors of finance, the CIO etc. Less than two in 10 (19%) were frontline officers, with the remaining 44% of respondents holding senior management roles.

It was also encouraging, for a survey with a bold 'Digital' in the title, that almost one in three (32.4%) respondents held the role of elected member, chief or assistant chief executive or head of customer services. Less than half of respondents in total held a technology (21.8%) or digital (21.8%) role.

Role	% of Response
Elected member	12.4%
Chief Executive /Director or Assistant Chief Executive	10.0%
Customer Service / Transformation Head	10.0%
Head of IT / CIOs or Senior IT Manager	21.8%
Digital Practitioner (web teams etc)	21.8%
Service Head	15.3%
Front Line Officer	8.8%
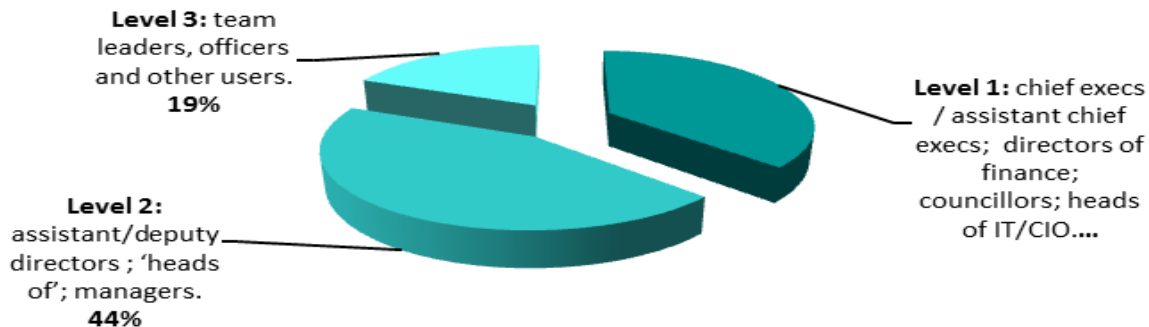
Supplier response

Twenty two responses from 20 unique organisations were invited to participate in the research. Half of these organisations were classified as 'large' organisations with the other half falling into SME categories – Micro (18%), Small (14%) and Medium (18%).
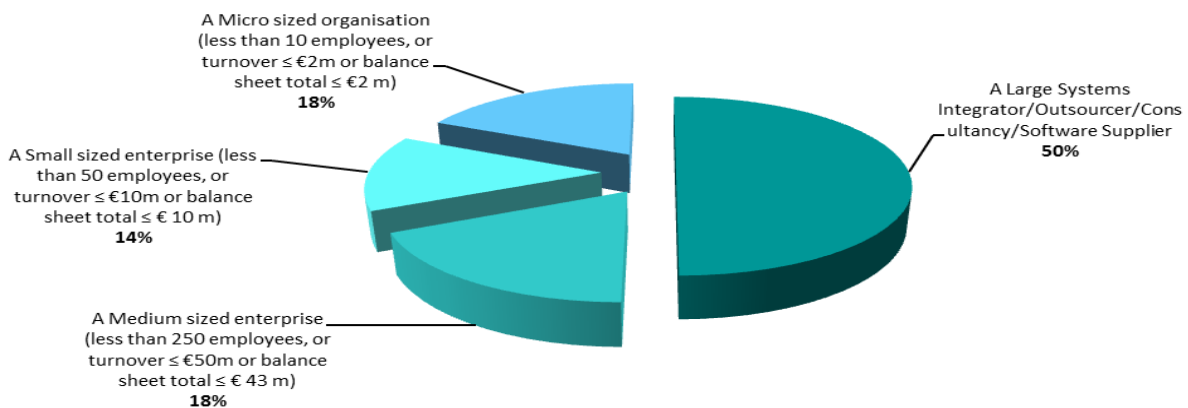
5. The Results

Dan Jellinek
Research Editor, UKAuthority

5.1 Do you agree or disagree with the following statements about Digital technologies?

	Strongly Disagree	Disagree	Neutral / Don't Know	Agree	Strongly Agree
Enable staff to work flexibly and on the move	0.0%	0.6%	7.3%	48.3%	43.8%
Help my organisation to deliver 'better for less'	0.6%	2.2%	6.2%	52.2%	38.8%
Facilitate service transformation	0.0%	2.8%	7.3%	57.3%2	32.6%
Make the customer journey better for our citizens	0.6%	4.5%	10.7%	52.8%	31.5%
Make my organisation more cost effective	0.0%	3.4%	16.9%	48.3%	31.5%
Help our citizens to interact with us	0.0%	3.9%	12.9%	56.2%	27.0%
Help officers to provide 'assisted digital' access where necessary	0.6%	0.6%	15.7%	60.1%	23.0%
Enable our officers and elected members to better collaborate internally with colleagues	0.0%	7.3%	15.2%	55.1%	22.5%
Provide a base for sharing services and business processes with other organisations	0.0%	12.9%	19.1%	50.0%	18.0%
Enable our officers and elected members to collaborate with other public sector colleagues	0.6%	5.1%	21.9%	55.6%	16.9%
Enable elected councillors to engage with the citizens they represent	0.0%	7.9%	29.8%	51.1%	11.2%
Will improve accountability to the public through making the council's performance more transparent	0.0%	16.4%	34.5%	40.1%	9.0%
Give equal access to all citizens	8.4%	41.0%	25.8%	16.3%	8.4%
Help to regenerate our local economy	2.8%	12.9%	46.6%	29.2%	8.4%
Enable us to flexibly outsource services and business processes to other organisations	2.8%	20.2%	42.1%	27.0%	7.9%

LOCAL GOVERNMENT RESPONSES

The general view of the growing role of digital technology in helping to provide council services more efficiently is overwhelmingly positive, the survey responses show.

Top of the list of benefits cited – with more than 9 in 10 local government respondents agreeing or strongly agreeing – are that digital technologies will 'Enable staff to work flexibly and on the move' (92.1% either agree or strongly agree); and will 'Help my organisation to deliver better for less': (91.0% agree or strongly agree). In addition, some 79.8% agreed or strongly agreed that technologies will 'Make my organisation more cost effective'.

Most also see major benefits for citizens: more than 80% of respondents agreed that technologies will 'Make the customer journey better for our citizens' (84.3% agree or strongly agree); 'Help our citizens to interact with us' (83.2% agree or strongly agree); and 'Help officers to provide 'assisted digital' access where necessary' (83.1% agree or strongly agree).

Other top rated responses include a boost for internal and external communications, with 77.6% agreeing or strongly agreeing that digital technologies will 'Enable our officers and elected members to better collaborate internally with colleagues'; and a further 72.5% that they will 'Enable our officers and elected members to collaborate with other public sector colleagues'.

In other areas of potential benefit, however, there appears to be significant uncertainty.

When asked if digital technologies would 'Help to regenerate our local economy', almost half of all respondents - 46.6% - said they were neutral/don't know. High levels of uncertainty were also recorded for the statements 'Enable us to flexibly outsource services and business processes to other organisations' (42.10%); 'Will improve accountability to the public through making the council's performance more transparent' (34.50%); and 'Enable elected councillors to engage with the citizens they represent' (29.80%). While these diverse areas are all also the subject of many positive responses in this survey, these results show that benefits of digitisation will not always be straightforward to realise.

In two areas, stronger disagreement is visible.

When asked if digital technologies will 'Enable us to flexibly outsource services and business processes to other organisations', almost a quarter of respondents: (23%) said they disagree or strongly disagree – which combined with the uncertainty levels above spells clear issues to resolve in the area of outsourcing, perhaps relating to the political climate.

Even more people – some 49.40% - disagree or strongly disagree with the statement that technologies will 'Give equal access to all citizens'. This near 50:50 split on the question of inclusion clearly signals a major area for work for local government, and is further drawn out by some of the free text comments below – which are also mixed.

In the free text responses to the open-ended follow-up question, 'What other things will digital technologies help your organisation to do?' councils added their own more detailed views of the potential benefits – as well as possible problems and barriers.

Citizen engagement was a theme here: *"Be creative in the ways we give citizens the opportunity to contribute towards decision making"*, said one respondent; *"Work more collaboratively with communities and enable communities to help themselves"*, said another. Others said digital technologies would help to *"Engage young people",* and by acting as an effective direct communications mechanism, they could also *"Encourage the public to make better use of local assets, parks, public rights of way"*.

Several comments focused on the use of data to better target services – what might be seen as an application of the current 'big data' movement: *"Focus our attention where it is needed"; "Maintain a single view of the customer";* and *"Potentially improve decision taking, through use of intelligence based on GIS"*, were three examples, the latter a fascinating insight into the potential uses of geographical data.

Others elaborated on the ability to use data to target services at groups or even individuals: *"Understand our customer/citizen needs better by segmenting our customers/citizens and targeting their needs"* said one; *"Offer appropriate services to citizens in a more individual way, based on greater understanding of their case history"*, said another.

A few respondents mentioned potential problems of digital exclusion, the flip-side of some of the benefits mentioned. *"The council covers a very rural area and therefore a lot of areas have no access to the internet"*, said one. *"It will help communicate with sections of the community but 100% digital will exclude many"*, said another.

Intriguingly though others saw digital technologies as the solution to these very same problems or access to people in remote areas: *"Allow people to access services better in rural areas, enabling older people to stay in their homes for longer and providing tourists with better information at the time they need it"*, said one respondent. Another said the council itself can help fight digital exclusion: *"Provide access to enable and empower residents to get online, support education and training for anyone that wants help to gain new skills. Ultimately these technologies (with our support) will help the digitally excluded gain new opportunities and improve their life chances."*

Further benefits to the workings of councils themselves mentioned were largely developments of themes already covered by the main question responses. These included answers such as *"Reduce carbon emissions, improve transport performance, reduce costs"; "Better understand our own internal performance"; "Increase staff productivity"; and "Improve how we use our resources like buildings"*. One respondent said simply: *"Survive!"*

Other responses included one which saw that *"Information sharing with other agencies remains a significant barrier to change"* – a perennial issue that will clearly remain a problem for many.

And another warned that, for all the lack of money around, proper investment in technology will still be needed to reap the rewards*: "Digital technology can help but only if there is sufficient investment capability and the organisation (and its partners) develop an appropriate culture and working style to maximise the benefits. Technology is only a tool. It depends on what can - and are allowed to do - with it."*

SUPPLIER RESPONSES, AND COMPARISON

Unsurprisingly, technology suppliers are even more bullish about the potential benefits of digital technologies than our local government respondents, with a full 100% of supplier respondents agreeing or strongly agreeing with the statements that technology will 'Help front line organisations to deliver better for less' and 'Help citizens to interact with front line services'.

Both these responses also feature among the top responses from councils, with delivery of 'better for less' in particular being top rated by both groups – an encouraging finding.

More than 9 in 10 suppliers also agreed or strongly agreed that technology will 'Make front line organisations more cost effective' (91.0%); 'Make the customer journey better for citizens' (90.9%); and 'Facilitate service transformation' (90.9%). Almost as many supplier respondents (86.4%) agreed or strongly agreed that technology will 'Provide a base for sharing services and business processes with other organisations'. Again these echo themes rated highly by councils, but generally there is even more positive presentation among suppliers – again, as one might expect.

There was more uncertainty in the supplier community that digital technologies will help council staff collaborate internally or between other organisations: around one third (31.8%) said they were 'neutral/don't know' to the statement that technology 'Will improve accountability to the public through making the council's performance more transparent'; and just under a third (27.3%) said they were 'neutral/don't know' to the statement that technology would 'Enable officers and elected members to collaborate with other public sector colleagues'; 'Enable officers and elected members to better collaborate internally with colleagues'; and 'Give equal access to all citizens'. These results might be explained by a lack of certainty about changes inside the public sector, looking in from the private sector.

More surprising is a lack of certainty among suppliers that digital technologies will 'Enable the flexible outsourcing of services and business processes to other organisations' – again around one third of supplier respondents (31.80%) were neutral on that question, and 9.1% disagreed or strongly disagreed. Clearly, the outsourcing of public services is an uncertain or controversial area for suppliers. It should be noted however that uncertainty here was even higher among local government respondents, at 42.1% uncertainty.

The strongest disagreement among suppliers was found in their response to the statement that digital technologies would 'Give equal access to all citizens' – a statement with which some 40.9% disagreed or strongly disagreed. This is a high level, though again council respondents had been even more negative than this, with their 49.4% disagreement level.

Overall therefore local government and supplier assessments appear broadly similar, with suppliers presenting a slightly more positive view overall in areas of doubt or disagreement.

In the free text part to this question, suppliers again mentioned similar issues to council respondents.

Efficiency themes were mentioned, such as *"Save money for the tax payer"; "Reduce carbon footprint"*; and *"Improve productivity"*.

Information sharing was mentioned by one supplier, who said that councils could use technology to *"Collaborate and co-deliver services with public, third or private sector partners. Join up service provision in multi-agency scenarios such as complex needs, adult social care"*.

Another said that councils could *"React more quickly and take better decisions through the use of big data analytics"* – the issue of service targeting, which had cropped up in councils' own responses. And on the issue of inclusion, one supplier made the positive and forward-looking comments that technology could be used to *"Engage potentially disenfranchised groups in public discussion, through innovative use of social media"*.

Others were more mixed in their assessments, raising potential problems and barriers. One said: *"At its best, transform local service delivery. At its worst, open up a whole minefield around security, data handling and give a stronger border to any digital divide."*

Another asserted that councils must change their culture and processes to take full advantage of the digital agenda – again, repeating a theme picked up by the authorities themselves: *"Organisations need to stop thinking about making their services digital, they need to completely rethink them. For example, a digital GP service is not about putting appointment booking online, it's about facilitating an online relationship with a GP - phone / video appointments meaning no need to travel, the ability to find an appointment close to where you are via an iPhone app, video panels of doctors to review and discuss complex cases and so on."*

5.2 Are the following important in successfully developing a 'Digital' approach in your organisation?

	Not Important	Neutral	Important
Digital leadership within my organisation	1.1%	6.2%	92.7%
Creating a business case for any digital-led change	1.1%	13.5%	85.4%
An internal skilled digital resource to support and drive this work	4.5%	11.8%	83.7%
Sharing best practice and experience of developing local digital services	0.6%	17.5%	81.9%
Leadership across local government about developing digital public services	1.1%	18.5%	80.3%
Creating a guiding digital strategy for my organisation	1.7%	20.3%	78.0%
Sharing of data / information between organisations	0.6%	22.0%	77.4%
Access to shared digital assets (for example: code developed by one organisation being freely available to all)	1.7%	25.3%	73.0%
Hearing more about exemplars of digital success in public services	4.0%	26.0%	70.1%
A pool of high quality suppliers of digital tools, skills and technologies	5.1%	36.0%	59.0%
National government's digital strategy	3.4%	46.6%	50.0%

LOCAL GOVERNMENT RESPONSES:

Strong leadership for digital change, backed by a business case, emerged as the most important aspect of developing a successful digital service approach from our local government respondents.

More than nine in 10 (92.7%) cited 'Digital leadership within my organisation' as important; with almost as many (85.4%) citing 'Creating a business case for any digital-led change'. Next highest – and still with support from more than four in every five respondents – were 'An internal skilled digital resource to support and drive this work' (83.7%), emphasising the importance or proper internal resourcing. And a similar number (78.0%) cite 'Creating a guiding digital strategy for my organisation'.

Other factors among the highest responses relate to leadership again, but across the sector as a whole: 81.9% said 'Sharing best practice and experience of developing local digital services' was important; and 80.3% 'Leadership across local government about developing digital public services'.

These are backed up by a specific response relating to sharing developments, supported by almost three-quarters of respondents (73.0%) who said 'Access to shared digital assets (for example: code developed by one organisation being freely available to all)' was important to success.

The factors cited as not so important to many respondents were: 'A pool of high quality suppliers of digital tools, skills and technologies', which was rated as important by most respondents (59.0%) but towards which a surprising number – more than one third (36.0%) – declared themselves to be neutral; and there was an even cooler response towards 'National government's digital strategy', rated as important by just half of our respondents (50.0%) with most of the rest (46.6%) declared neutral.

In the free text section asking respondents to list any other factors they view as important in successfully developing a digital approach, many respondents returned to themes from the previous question of citizen targeting, and digital inclusion – for example, *"Making sure it is truly inclusive through assisted access arrangements"*. One urged central government to put more funding into this area, despite the £50m announced recently to support assisted digital.

Other topics which were the subject of comment by several respondents included increasing internal resources and skills, and running training and communications programmes to ensure everybody in the councils buys in to the digital revolution, *"particularly senior councillors"*.

On the practical level, one respondent said that care should be taken in *"Avoiding councils all developing bespoke tools. As much as possible using widely used platforms and technologies such as the main social media networks, not trying to reinvent. Don't worry too much about control and risk - this can be a barrier."*

However in sharing tools and best practice exemplars, said another, *"Evidence behind these is really important. What are the customer satisfaction results for the change in that service? How much has been saved by a shift to digital?"*

Another respondent backed local government to come up with its own answers: *"I think a practitioner-led network for sharing is by far the most useful approach to collaboration. External organisations or central government feel very much like things are being done to rather than by the sector and often feel like they ignore the talent, innovation and progress of digital practitioners in local government."*

SUPPLIER RESPONSES AND COMPARISON

Perceived priorities from the supplier community for developing successful digital public services were similar to those cited by local government respondents, but expressed in a different order.

While every supplier respondent (100%) cited 'Digital leadership within each organisation' as important – this had also been the top priority among local government respondents – suppliers almost all also stressed 'Leadership across local government about developing digital public services' (95.5%) and 'Sharing best practice and experience of developing local digital services' (95.5%) as important, rating these slightly higher than the council respondents.

One of the biggest differences was in the factor of 'A pool of high quality suppliers of digital tools, skills and technologies', which was not rated highly by local councils but was rated as important by 90.9% of supplier respondents – an understandable difference in perspective.

Other factors rated as important by suppliers in order of response include 'Sharing of data / information between organisations' (90.5%); 'Hearing more about exemplars of digital success in public services' (86.4%); 'A guiding digital strategy for each organisation' (77.3%); and 'An internal skilled digital resource in front line organisations to support and drive this work' (77.30%). So priorities of leadership and best practice exchange are similar across councils and suppliers, though suppliers rated 'Creating a business case for any digital-led change' as a lower priority than councils, at 68.2%. As more than 85% of councils cited the business case as important, suppliers may need to be in closer tune with their customers here.

Suppliers shared the lower view of councils regarding the importance of 'National government's digital strategy', with only 59.1% citing this as important, and 31.8% holding a neutral view.

In their free text responses, suppliers generally offered more practical, technology-focused issues as important to successful digital projects.

Factors cited for example included *"Up to date software and hardware, common platforms, shared access to data";* and one recommended: *"A pragmatic approach to adoption of open standards, and freedom for organisations to adopt the technology they feel best suited to the case in hand providing it meets requirements for interoperability, usability,*

security and so on. A willingness to look outside of public sector to see what private sector is doing, and what's working/not working."

Viewing the sector from the outside and perceiving it to be still too risk-averse, another recommended *"Adopting a more flexible and risk based approach to information and data sharing - rather than an overly risk averse one".*

Finally, one respondent offered an interesting potential priority that might seem surprising coming from the supplier side, but shows at least some suppliers are prepared to be judged on results: *"Choosing partners that are willing to engage on a pay-for-performance basis."*

5.3 Who is leading on Digital within your organisation?

	Yes	No	Don't Know
Head of IT/CIO	68.3%	15.5%	16.1%
Head of Customer Service	57.5%	21.9%	20.5%
Web Manager	51.9%	28.9%	19.3%
Chief Executive	45.1%	32.4%	22.5%
Head of Transformation	42.4%	27.1%	30.6%
Individual Service Heads	39.4%	34.8%	25.8%
Elected Members	31.9%	41.8%	26.2%
Head of Finance	23.6%	47.2%	29.1%
Frontline Officers	21.9%	54.7%	23.4%
Suppliers	12.0%	66.4%	21.6%
External Consultants	8.9%	67.7%	23.4%

LOCAL GOVERNMENT RESPONSES

Heads of IT/ Chief Information Officers are clearly still a focus as people leading digital services in local government, despite such issues becoming ever more mainstream: some 68.3% of respondents said that they were leading the work on digital services at their council.

However, the fact that several other job titles gained responses of more than 50% signals clearly that even where heads of IT/CIOs are 'leading', they are often leading in conjunction with other managers, and not operating on their own.

The two other job titles cited by more than half of councils as also having a leadership role here are 'Head of Customer Service' (57.5%); and 'Web Manager' (51.9%) – other known strong sites of operation for digital services in most councils, with customer services clearly establishing itself as the main non-IT-related department to have a handle on digital issues.

It is encouraging to see that the next highest however, cited by almost half of all council respondents (45.1%) as leading digital transformation, is the chief executive. This is a truly surprising finding, given that in the not-too-distant past the idea that a council chief executive would be genuinely leading in an area associated with technology use would have been taken less than seriously.

Others with a significant showing include 'Head of Transformation' (42.4%) – a designation that might encompass temporary or duplicate roles – and 'individual service heads' (39.4%), another interesting finding at such a high level, showing that the digital agenda is being devolved within council management in many cases.

It is less encouraging that elected members are cited as leading the digital agenda in fewer than one third (31.9%) of cases.

Other lower level leaders include head of finance (23.6%); front-line officers (21.9%); suppliers (12.0%); and external consultants (8.9%), these last two showing that private sector partners, while crucial to digital services, are rarely present in a leadership role - as one might expect from a democratic public service.

Asked who else leads on digital within their organisations, many respondents cited the director of communications or the communications team, which has historically often been the site of the website team within many councils.

Another respondent confirms the suggestion that the ICT department often shares leadership with other parts of the organisation, saying: *"Customer services and ICT have been brought together in order to have leadership of the agenda"*.

Other individual departments such as democratic services get a look-in as well, in isolated places.

One respondent elaborates on a devolved model of leadership, as follows: *"There is a transformation group for each of our strategic objectives, and 'digital' is woven into all of the transformation enquiries that each is undertaking."*

Finally, one local government respondent offers a real-world, realpolitik perspective on the ongoing shifts of planning, power and priorities for digital services, saying: *"Marketing have an involvement but they don't lead (nor should they) and our IT would say that they 'lead' but they are actually struggling to keep up with the rest of us. The vision for digital and its appropriate placement is very much a bottom-up arrangement here, although board level managers have recently started to get twitchy about our web-site not being up-to-scratch."*

SUPPLIER RESPONSES

Suppliers were asked to assess, from their perspective, who they think appears to be leading within front line public service organisations.

This outside perspective seems to be different from council's own responses.

For suppliers, they feel that the head of customer service is most often leading on digital services (76.2%) – compared with this being only the second highest listed by councils, at 57.5%. Next highest in suppliers' view is the head of transformation, at 71.4% - again significantly more than council's assessment of the role of this job title (42.4%)

The biggest difference in perception is that suppliers feel that they themselves are playing a relatively large role in leading digital services, at some 70.0%, and external consultants a fair-sized role too, at 50%: for councils these figures were less than one fifth of this level, at 12.0% and 8.9% respectively.

Exactly two-thirds of suppliers (66.7%) do feel the head of IT/CIO plays a leading role in digital services though, a high rating, if not at the top as it was with council respondents.

Suppliers also recorded slightly lower levels of perception that digital services were being led by the web manager (33.0%); individual service heads (25.0%); the chief executive (23.8%); head of finance (19.0%); and front line officers (15.0%). Their perception of elected members' leadership of this agenda was also less than half of council respondents' perception (14.3%, compared with 31.9%): a sign that, to the technology supplier community, elected members have very low visibility indeed, surely not a good state of affairs.

Asked 'Should anyone else lead on digital within these organisations?' one supplier said that what was needed was *"A mix of these people. Like everything in local government, there is a variety of approaches and that is not a bad thing."* However the strongest topic of comment here was that the suppliers wanted to see more leadership of the digital agenda from the very top of local government.

"Not enough of the chief executives/top level engaged", said one; *"Needs to come from the top - if the CEO/CFO isn't on board then the business transformation and hence benefits won't happen. IT/web lead is insufficient",* said another.

And a third said: *"The CEO should lead. The CFO should recognise that it's not just about the money, it's about an organisation fulfilling its mandate."*

5.4 Has your organisation created a Digital Strategy to guide its digital developments?

Value	Percent
Yes	35.5%
No, but we intend to create a digital strategy	50.6%
No, and we have no intention of creating a digital strategy	13.9%

Do you agree or disagree with the following statements about Digital Strategies?

	Strongly Disagree	Disagree	Neutral / Don't Know	Agree	Strongly agree
A digital strategy would be a useful tool in ensuring that we make best use of digital technology in our organisation	2.3%	4.0%	12.5%	52.8%	28.4%
Digital developments form a key part of our management strategy	3.4%	10.2%	26.1%	42.0%	18.2%
My organisation is ready to embrace the opportunities that digital brings	4.5%	11.9%	25.6%	42.0%	15.9%

LOCAL GOVERNMENT RESPONSES

When it comes to strategic readiness, this seems to be very much a work in progress for councils – perhaps a surprise, given that the digital agenda is not exactly new anymore.

Only a little more than one third (35.5%) said there organisation has already created a digital strategy to guide its digital developments; though a further 50.6% said there was an intention to create a strategy, meaning that 86.1% of respondents have a strategy either in place or in the pipeline.

However that leaves 13.9% who replied: "No, and we have no intention of creating a digital strategy".

This number is alarmingly high. It may include responses from individual service departments rather than entire councils, but even so it seems a shock that there can be any councils or departments that are not taking digital services seriously enough yet to be at least developing a proper strategy for them.

In response to a series of slightly more detailed break-down questions on formulating a digital strategy, 4 in 5 councils (81.2%) agreed or strongly agreed with the statement 'A digital strategy would be a useful tool in ensuring that we make best use of digital technology in our organisation' – tallying closely with the 86.1% who either already have a strategy or are planning one.

A lower proportion however (60.2%) agreed or strongly agreed with the slightly stronger wording 'Digital developments form a key part of our management strategy', and a similar amount (57.9%) agreed or strongly agreed 'My organisation is ready to embrace the opportunities that digital brings'. This suggests there is still some way to go before the digital agenda is strongly fused with the wider senior management agenda across the whole of local government.

SUPPLIER RESPONSES

Supplier responses to a similar question from their external perspective – 'Do you think that front line public services are ready to embrace the opportunities that digital can bring?' – are equally mixed. Two-thirds did respond in the positive – slightly higher than the 57.9% agreeing with the same question from the local government perspective - but this means that a full third do not feel front line public services are yet geared up for the digital age, a major gap in potential.

5.5 Your organisation and 'Digital' today…

	%
What percentage of your organisation's individual SERVICES are 'Digital by Default' - or 'Digital by Design' - today?	24.8
What percentage volume of your service TRANSACTIONS are digital today?	37.97

Just over half of respondents were able to indicate the percentage of their organisation's individual services that were digital by default, or design, today. Figures ranged between 0% and 95%, with the average standing at 24.8%.

These respondents were also able to indicate the volume of service transactions that was digital today. Figures again ranged from 1% to 100%, with the average standing at 37.97%.

5.6 Have digital tools and technologies delivered any savings to your organisation over the past 12 months?

Value	Percent
Yes	60.4%
No	39.6%

If yes, how much money has your organisation saved?

NB. Only 29 respondents were able to put a figure to this question. The results are therefore indicative only, ie they do not have statistical significance.

Range	£1 to £12,000,000
Average	£1,064,567
Average of savings above £1,000	£1,470,071

LOCAL GOVERNMENT RESPONSES

When it comes to savings, the picture is again mixed, with most respondents (60.4%) reporting at least some level of savings, but therefore 39.1% who say that no savings have been accrued so far from digitisation. Since savings are the top priority for local government, this is disappointing.

It was disappointing that so few (29) were able to put a figure to savings to date. However, of those that do record them, if we take an average of all councils recording savings of more than 1,000, we find the average is £1,470,071 – in other words, average savings for councils seem to be around £1.5m, which is appreciable.

On the other hand, there is a very wide range of savings reported (again if we look above £1,000), from just £1,500 right up to £12,000,000, with very few recording the same savings level. This suggests savings are possible but not guaranteed from any particular digitisation project.

5.6 What do you think is holding back 'Digital' development in your organisation today?

	Yes	No	Don't Know
Legacy systems and ICT infrastructure	72.7%	25.6%	1.7%
Lack of development funds	59.4%	30.3%	10.3%
Culturally uncomfortable for the organisation	50.6%	40.5%	8.9%
Unwillingness to change / non-cooperation of colleagues	49.7%	38.9%	11.4%
Lack of leadership (senior management / elected councillors)	43.6%	47.3%	9.1%
Inflexible procurement processes	42.4%	43.0%	14.5%
Lack of in-house digital skills	41.9%	49.7%	8.4%
Poor local broadband access	40.1%	48.5%	11.4%
Lack of customer insight / evidence of user need	39.8%	44.6%	15.7%
Not understanding the customer journey	38.9%	49.7%	11.4%
Supplier inflexibility	33.9%	45.5%	20.6%
Lack of buy in from senior management / members	32.9%	53.9%	13.2%
Interpretation of legal requirements eg Data Protection	26.1%	57.0%	17.0%
Inability to market citizen take up of digital services	21.8%	52.7%	25.5%
Lack of supplier digital skills	16.4%	59.4%	24.2%

LOCAL GOVERNMENT RESPONSE

Two factors stand alone at the head of the list of barriers to digital progress cited by our local government respondents: 'Legacy systems and ICT infrastructure', cited as a barrier by 72.7% of respondents, and 'Lack of development funds', cited by 59.4%. It is not surprising that a lack of funding is coming up as a major barrier in the current public sector climate: it is more surprising that legacy systems are still such a barrier to progress in the public sector, and that this is coming out as the top barrier, above even funding.

The next two major barriers, cited by around half of all local government respondents, are similar ones, and once more familiar ones for any public sector change: they are 'Culturally uncomfortable for the organisation' (50.6%) and 'Unwillingness to change/non-cooperation of colleagues' (49.7%).

Lesser barriers – with significant levels of people still saying they are a barrier, though slightly more people in each case saying they are not – include 'Lack of leadership (senior management/elected councillors)' (43.6% say important; 47.3% not); 'Inflexible procurement processes' (42.4% say important; 43.0% say not); 'Lack of in-house digital skills' (41.90% say important; 49.7% say not); Poor local broadband access (40.1% important; 48.5% not); 'Lack of customer insight/evidence of user need (39.8% important; 44.6% not); 'Not understanding the customer journey' (38.9% important; 49.7% not); and 'Supplier inflexibility' (33.9% important; 45.5% not). A theme here is a difficulty understanding what the citizen needs, though in all cases, progress is clearly being made since more people say they are not barriers, than are.

Finally, four issues are clearly not viewed as major barriers to progress in local government, with far more respondents citing that as 'not important' than those saying the opposite. These are 'Lack of buy in from senior management/members' (32.9% say important; 53.9% not); 'Interpretation of legal requirements eg Data Protection'

(26.1% say important; 57.0% not); 'Inability to market citizen take up of digital services' (21.8% important; 52.7% not); and 'Lack of supplier digital skills'; (16.4% important; 59.4% not).

The most surprising finding of these is that a lack of buy-in from senior management and members is not viewed as an important hindrance to progress by most councils: since it has already been established that such buy-in is viewed as vital to successful digital services, it follows that most people in local government digital services now feel such buy-in has been achieved.

In the free text response section, asked 'What else, if anything, do you feel is holding back digital progress?', several local government respondents offered variations on the theme that a lack of money was the key issue, or that the need to battle the effects of major spending cuts was taking attention and priorities away from the development of digital services.

One said what is lacking is *"A business case that shows that the investment is worthwhile at this point in time"* – showing how hard it is to make any investment case in the current climate.

Others elaborated on the barriers relating to issues with driving innovation and change in a risk-averse public sector culture. *"Lack of conviction and belief in its potential - reluctance to change"*, said one; *"Council structures and silo working"*, said another; and a third: *"Inability to be innovative and take a risk"*.

A variation on this was one respondent who bemoaned supplier lock-in in the IT department: *"Too little understanding of the possibilities, and the rigidity of the IT department in terms of their adherence to [named supplier] agreements."*

Another said the cultural problems ran deep: *"Culturally I think emphasis so far has been on digital for communication, moving toward customer service but the organisation is still lacking understanding on potential for service transformation/delivery. I think reasons for this are many – poor digital leadership in the organisation and across the sector, lack of empowerment for those with digital skills, embedded culture, fear of moving away from established process and supplier relationships...the list goes on!"*

A small sub-set had continuing concerns about issues relating to digital inclusion. *"Demographics - local residents can't afford digital equipment"*, said one; *"Lack of internet access, due to cost, for those customers who could benefit most"*, said another; and a third: *"Slow broadband is the major blocking point for us. Perceived lack of need in our rural community."*

SUPPLIER RESPONSES

On the whole, suppliers seem to perceive greater numbers of serious barriers to implementing digital public services, than our public service respondents.

The barriers rated highest by the suppliers were mostly different ones to the council respondents, too.

Every single supplier respondent (100%) said the fact that digitisation was "Culturally uncomfortable for the organisation" is a barrier to progress, compared with just 50.6% of council respondents. Clearly, those looking in from the outside have a different view of the difficulties of culture change to those within the culture itself.

Other barriers rated very highly by suppliers were "Legacy systems and ICT infrastructure" (86.4%); "Unwillingness to change / non-cooperation of colleagues" (81.8%); "Inflexible procurement processes" (77.3%); "Lack of leadership (senior management / elected councillors) (76.2%); and "Lack of in-house digital skills" (76.2%).

One of these – about legacy systems, does cross over with the local government respondents' view of key barriers, so reinforcing the seriousness of this barrier. The other four barriers are rated more highly than their council counterparts, however, suggesting that suppliers view issues such as unwillingness to change; inflexible procurement; lack of leadership; and lack of in-house digital skills as more serious problems than the public sector seems to realise.

In particular there seems to be a wide perception gap in terms of leadership from senior managers and members, between our council and supplier respondents: the suppliers rate this as a very serious issue (76.2% citing it is important), compared with just 43.6% of council respondents. And there is a similar perception gap relating to the flexibility of the procurement process (77.3% of suppliers, compared with 42.4% of local government), again suggesting a difference of view from those on the other side of the same process.

The second tier of supplier concerns include 'Not understanding the customer journey' (68.2% say this is important, more than the 38.9% of councils); 'Lack of development funds' (61.9% - similar to the 59.4% of local government respondents); 'Inability to market citizen take up of digital services' (57.1%, compared with only 21.8% of councils);

'Lack of buy in from senior management/members' (57.1%, compared with 32.9% of councils); 'Interpretation of legal requirements eg Data Protection' (57.1%, compared with only 26.1% of councils); and 'Poor local broadband access' (54.5%, compared with 40.1% of councils).

Perhaps most predictable was a big gap in supplier perceptions of their own shortcomings, compared with local authorities: only 19.0% of suppliers said 'Supplier inflexibility' was an important barrier, compared with 33.9% of local government respondents; and a mere 4.8% of suppliers owned up to 'Lack of supplier digital skills', compared with a still small 16.4% of councils.

In the free response section, where suppliers were asked 'What else, if anything, do you feel is holding back digital progress?' the issue of leadership again loomed large.

"Lack of chief executive understanding of the potential of digital is often an issue", said one respondent; while another said: *"Lack of more detailed direction and exemplars. Not wanting to go first."*

A third expressed the issue of poor leadership in a slightly different way: *"People are thinking that digital is a different way of doing what we do today. Therefore there needs to be a cost benefit analysis. Digital is different, full stop."*

Appendices

Appendix I – Questionnaire

ALL ANSWERS ANONYMOUS - OPEN TILL 14:30 2ND JULY

There are many definitions of what 'Digital' is - or could potentially be - in relation to Local Government. However there is yet little consensus as to what 'Digital by Default' or 'Digital by Design' actually looks and feels like to the sector. **A major piece of research** is therefore being conducted in order to provide insight into how and where digital technologies can help local public services to provide better services to their citizens for less.

This unique project is being conducted by a research consortium comprising: the **Department of Communities & Local Government**, the **Local Government Association**, **Socitm**, members of the **Local Government Digital Alliance** and the **UKAuthority** editorial team, to understand how the development of 'Digital Public Services' is being approached across front line public services today.

As a research group we greatly value your input and thank you in advance for participating in this important project.

The results will be reported on UKAuthority.com and available, free of charge, to public sector employees.

Thank you for helping with this project.

Helen Olsen
CEO & Managing Editor

UKAuthority

Department for Communities and Local Government

Local Government Association

LocalGov Digital

soc**itm**

Local CIO Council

Local Government Delivery Council

Local Contact Council

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1. Please enter your name:

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2. Please enter your job title:

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3. Please enter your organisation name:

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4. Where you work in the organisation: I am a...

[-- Please Select --   ▼]

5. **Do you agree or disagree with the following statements about Digital technologies?**

Digital technologies will…

	Strongly Disagree	Disagree	Neutral / Don't Know	Agree	Strongly Agree
Help my organisation to deliver 'better for less' *	○	○	○	○	○
Make the customer journey better for our citizens *	○	○	○	○	○
Help officers to provide 'assisted digital' access where necessary *	○	○	○	○	○
Give equal access to all citizens *	○	○	○	○	○
Make my organisation more cost effective *	○	○	○	○	○
Facilitate service transformation *	○	○	○	○	○
Enable staff to work flexibly and on the move *	○	○	○	○	○
Help our citizens to interact with us *	○	○	○	○	○
Enable elected councillors to engage with the citizens they represent *	○	○	○	○	○
Will improve accountability to the public through making the council's performance more transparent	○	○	○	○	○
Provide a base for sharing services and business processes with other organisations *	○	○	○	○	○
Enable us to flexibly outsource services and business processes to other organisations *	○	○	○	○	○
Enable our officers and elected members to better collaborate internally with colleagues *	○	○	○	○	○
Enable our officers and elected members to collaborate with other public sector colleagues *	○	○	○	○	○
Help to regenerate our local economy *	○	○	○	○	○

What other things will Digital technologies help your organisation to do?

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6. **Are the following important in successfully developing a 'Digital' approach in your organisation?**

	Not Important	Neutral	Important
Leadership across local government about developing digital public services	○	○	○
Digital leadership within my organisation	○	○	○
National government's digital strategy	○	○	○
Creating a guiding digital strategy for my organisation	○	○	○
Creating a business case for any digital-led change	○	○	○
A pool of high quality suppliers of digital tools, skills and technologies	○	○	○
An internal skilled digital resource to support and drive this work	○	○	○
Sharing best practice and experience of developing local digital services	○	○	○
Hearing more about exemplars of digital success in public services	○	○	○
Access to shared digital assets (for example: code developed by one organisation being freely available to all)	○	○	○
Sharing of data / information between organisations	○	○	○

Are there any other things that are important in successfully developing a 'Digital' approach?

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7. **Who is leading on Digital within your organisation?**

	Yes	No	Don't Know
Elected Members	○	○	○
Chief Executive	○	○	○
Head of IT/CIO	○	○	○
Head of Finance	○	○	○
Head of Customer Service	○	○	○
Head of Transformation	○	○	○
Web Manager	○	○	○
Individual Service Heads	○	○	○
Frontline Officers	○	○	○
External Consultants	○	○	○
Suppliers	○	○	○

Does anyone else lead on Digital within your organisation?

8. **Has your organisation created a Digital Strategy to guide its digital developments?**

-- Please Select -- ▾

Do you agree or disagree with the following statements about Digital Strategies?

	Strongly Disagree	Disagree	Neutral / Don't Know	Agree	Strongly agree
A digital strategy would be a useful tool in ensuring that we make best use of digital technology in our organisation	○	○	○	○	○
Digital developments form a key part of our management strategy	○	○	○	○	○
My organisation is ready to embrace the opportunities that digital brings	○	○	○	○	○

9. **Your organisation and 'Digital' today…**

	%
What percentage of your organisation's individual SERVICES are 'Digital by Default' - or 'Digital by Design' - today?	
What percentage volume of your service TRANSACTIONS are digital today?	

10. **Have digital tools and technologies delivered any savings to your organisation over the past 12 months?**

-- Please Select -- ▾

If yes, how much money has your organisation saved?
Please enter the figure for pounds (£) saved to the nearest whole number

**11. What do you think is holding back 'Digital' development in your organisation today?**

	Yes	No	Don't Know
Lack of development funds	○	○	○
Culturally uncomfortable for the organisation	○	○	○
Unwillingness to change / non-cooperation of colleagues	○	○	○
Lack of leadership (senior management / elected councillors)	○	○	○
Lack of customer insight / evidence of user need	○	○	○
Not understanding the customer journey	○	○	○
Legacy systems and ICT infrastructure	○	○	○
Inflexible procurement processes	○	○	○
Lack of in-house digital skills	○	○	○
Lack of supplier digital skills	○	○	○
Supplier inflexibility	○	○	○
Inability to market citizen take up of digital services	○	○	○
Lack of buy in from senior management / members	○	○	○
Poor local broadband access	○	○	○
Interpretation of legal requirements eg Data Protection	○	○	○

What else, if anything, do you feel is holding back digital progress?

12. This survey

	Yes / No
Would you like to receive a copy of the report from this research once published?	-- Please Select -- ▾
Would you like to be entered into the prize draw for a £50 Amazon voucher?	-- Please Select -- ▾

Submit

0%

Appendix II – Organisations Responding

Angus Council

Association of Greater Manchester Authorities

Babergh District Council

Basingstoke & Deane Borough Council

Bath & North East Somerset Council (x2)

Bedford Borough Council

Birmingham City Council

Bournemouth Borough Council

Bracknell Forest Borough Council

Bradford City Council

Brighton & Hove City Council

Bristol City Council

Bromley London Borough Council

Buckinghamshire County Council (x2)

Bury Metropolitan Borough Council

Calderdale Council

Camden London Borough Council (x3)

Canterbury City Council

Charnwood Borough Council

Chelmsford Borough Council

Cherwell District Council

Cheshire East Council (x2)

Cheshire West and Chester Council (x2)

Chiltern District Council

Christchurch Borough Council

Cornwall Council

Coventry City Council

Cumbria County Council

Daventry District Council

Derbyshire County Council (x2)

Devon County Council

Dorset County Council

Dudley Metropolitan Borough Council (x3)

Dumfries & Galloway Council

East Ayrshire Council

East Dorset District Council

East Hertfordshire Council

East Riding of Yorkshire Council

East Sussex County Council (x2)

Eden District Council

Edinburgh (City of) Council (x2)

Fareham Borough Council

Great Yarmouth Borough Council

Greenwich Council

Gwynedd Council

Hackney London Borough Council (x2)

Halton Borough Council

Hampshire County Council (x2)

Herefordshire Council

Hertfordshire County Council (x3)

High Peak Borough Council

Highland Council

Hillingdon London Borough Council

Horsham District Council

Hounslow London Borough Council (x2)

Isles of Scilly Council

Islington Council

Kensington & Chelsea Royal Borough Council

Kent County Council

King's Lynn & West Norfolk Borough Council

Kirklees Council (x2)

Knowsley Metropolitan Borough Council

Lambeth London Borough Council

Lancaster City Council

Leeds City Council (x2)

Lewes District Council

Lichfield District Council (x2)

Lincolnshire County Council (x2)

Maidstone Borough Council

Maldon District Council

Malvern Hills District Council

Manchester City Council (x2)

Merton London Borough Council

Mid Devon District Council (x2)

Mid Suffolk District Council

Milton Keynes Council

Mole Valley District Council

Monmouthshire County Council

Newham London Borough Council (x2)

Norfolk County Council

North Devon Council

North Norfolk District Council (x2)

North Warwickshire Borough Council

North West Leicestershire District Council

North Yorkshire County Council

Northumberland County Council

Norwich City Council

Nottingham City Council

Nottinghamshire County Council

Perth & Kinross Council (x2)

Poole Borough Council

Poole Borough Council

Portsmouth City Council

Preston City Council (x2)

Renfrewshire Council

Rother District Council (x2)

Rushmoor Borough Council

Salford City Council

Scottish Borders Council

Sevenoaks District Council

Sheffield City Council

Shepway District Council

Solihull Metropolitan Borough Council (x2)

Somerset County Council

South Bucks District Council

South Holland District Council

South Lanarkshire Council (x2)

South Norfolk Council

South Oxfordshire District Council

South Tyneside Council

Southampton City Council

Southwark Council (x2)

Staffordshire County Council

States of Jersey

Stevenage Borough Council

Stockport Metropolitan Borough Council (x2)

Suffolk Coastal District Council

Suffolk County Council

Sunderland City Council

Swale Borough Council

Tandridge District Council

Taunton Deane Borough Council (x2)

Three Rivers District Council

Tonbridge & Malling Borough Council

Wakefield City Council

Walsall Council

Warwickshire County Council (x2)

Waverley Borough Council

Wellingborough Borough Council

Welwyn Hatfield Borough Council

West Berkshire Council (x2)

West Lindsey District Council

West Sussex County Council

Western Isles Council

Westminster City Council (x2)

Wigan Council (x2)

Wirral Council

Wolverhampton City Council

York (City of) Council (x2)

Unknown Respondent (x2)

Appendix III – Job Titles Responding

Address Manager

Application Developer

Assistant Chief Executive

Assistant Chief Executive - Community Services

Assistant Director Adult Care

Assistant Director Culture & Customers

Assistant Director of Customer Contact & ICT Strategy

Building Consultancy ICT Manager

Business Analyst (x2)

Business Development Manager

Business Improvement Manager

Business Transformation Manager

Cabinet Member

Cabinet Member for Finance

Cabinet Member for Finance & Customer Services

Cabinet Member for Public Health and Communities

Cabinet Member for Transformation Regeneration

Chief Executive (x4)

Chief Information Officer

Chief Officer - Information Services

Communications & Improvement Officer

Communications & Marketing Director

Communications & Reputation Manager

Communications Manager

Communities & Assets Portfolio Holder

Contact Centre Manager

Contact Centre Team Leader

Corporate Customer Strategy Manager

Corporate GIS Manager

Corporate IT Manager

Corporate Manager - Customer Services

Corporate Support Officer

Corporate Web Editor

Corporate Web Manager

Council Deputy Leader (x4)

Council Leader (x2)

Councillor & Portfolio Holder for Community Leadership

Councillor & Portfolio Holder for Corporate Resources

Councillor (x7)

Customer Access ICT Programme Manager

Customer Contact Manager

Customer Relations Manager

Customer Services Centre Manager

Customer Services Manager (x2)

Data Observatory Research Officer

Deputy Director - ICT, Highways & Business Services

Development Coordinator - Customer Service Centre

Digital Communications Officer (x2)

Digital Media Officer

Director of Adult, Children's & Community Services

Director of Communities

Director of Resources (x2)

Director of Sustainable Development

Divisional Director of ICT Resources (CIO)

E-Content Development Manager

Efficiency & Improvement Officer

E-Government Officer

Electronic Library Manager

Enterprise Information Architect

Environmental Monitoring & Licensing Manager

Family Inclusion Manager

Friends of Lambeth Libraries

GIS Manager

Graphic & Print Services Manager

Group Manager ICT Central Services

Head of Communications & Engagement

Head of Corporate & Transactional Services

Head of Customer & Cultural Services

Head of Customer Service (x4)

Head of Customer Services

Head of Governance Services

Head of ICT

Head of ICT Infrastructure

Head of ICT Services

Head of ICT Shared Services

Head of Information and Customer Services

Head of Information Technology (4)

Head of IT & Organisational Development

Head of Libraries & Heritage

Head of Libraries and Information services

Head of Performance & Workforce Development

Head of Planning & Local Development

Head of Policy & Partnership

Head of Revenues, Benefits & Customer Services

Head of Service - Customer & Exchequer

Head of Service - Information Assets

Head of Strategic Direction & Communication Management (Shared)

Head of Strategic ICT Partnerships

Head of Strategic Partnerships (Learning)

Head of Strategy & Directorate Support (Culture and Environment)

Head of Strategy, Support & Housing

Head of Technical Strategy & Planning

Head of Youth Service & Commissioning

ICT Business Relationship Manager

ICT Business Services Manager

ICT Business Support Officer

ICT Contracts Officer

ICT Development Team

ICT Infrastructure Team Leader

ICT Manager

ICT Service Manager

ICT Technical Project Manager

ICT Web Development Team Leader

Information Development Manager

Information Management Officer

Information Officer

Information Officer - Libraries

Information Services Librarian

Information Systems & Strategy Manager

Interim Head of IT

IT Manager

IT Systems & Programme Director

Joint Chief Executive

Library Operations & Commissioning Manager

Online Services Officer

People's Network Development Manager - Libraries

Personnel & Customer Services Manager

Principal Policy Officer

Process Design Team Leader - Customer Access to Services

Procurement Programme Manager

Programme Director

Project Manager

Project Officer

Public Access & Web Officer

Public Reference Librarian

Quality Manager

Revenues and Benefits, Customer Services and ICT

Senior Analyst

Senior Communications Officer

Service Development Coordinator: Information & Digital

Service Director - ICT & Procurement

Service Improvement Manager

Strategic Director

Strategic Director & Deputy Chief Executive

Strategic Director Community, Health & Social Care

Strategic Director Resources & Business Transformation

Strategy Manager

Systems Performance & Account Manager

Technical Project Manager

Technology Manager - ICT Shared Services

Transformation Manager

Unknown

Web Communications Manager

Web Content & Development Officer - Housing

Web Content Manager

Web Developer

Web Manager (x3)

Web Services Manager

Website & Social Media Officer

Workstream Programme Manager

YOT Manager

Appendix IV – Supplier Organisations Responding

Organisations

Atos (x2)
BDO
Cisco
CSC
Experian
Fujitsu
Informed Communications Ltd
Ken Chad Consulting
Liveperson
Local Secrets - YouGet
McAfee
Microsoft (x2)
OLM Group
Pregem Computing Limited
PSN GB
Rainmaker Solutions
SCC
Skyscape Cloud Services
Unknown
Updata

Job Titles

Associate
CTO
Director (x3)
Director of Public Sector Strategy & Relations
e-Government Product Director
Head of Business Development - Public Sector
Head of Local Government
Head of Marketing
Head of Public Services Network (PSN)
Industry Consulting partner
Managing Director Local Government
Managing Partner, Head of Public Sector Consulting
Marketing / Business Development Director
Marketing / Owner
Marketing Manager
Partner
Public Sector CTO
SVP EMEA
UK Government Industry Manager
Unknown