Field Redesign

Redesigning our full social survey collection operation at the UK’s Office for National Statistics
Setting the scene: The current design

Social Survey Collection:
3 Separate communities

- Telephone Operations (TO)
- International Passenger Survey (IPS)
- Face to Face (FtF)
Setting the scene: Why redesign?

**Our current world is challenging**

**For our people:**
- Difficult work/life balance
- Limited opportunity for progression &/or promotion
- Difficult to recruit into roles

**For our business:**
- Legacy systems
- Complex processes
- Lack of flexibility

**Our future world is changing**

- Evolving stakeholder needs
- Diversifying respondent requirements

\[ \text{Rapid Transformation} \]

Online-first, fluid and mixed-mode survey data collection

Additional respondent services needed

Field redesign:
A project to come up with the future social survey collection design.
The approach

1) Initiation, scoping and planning

2) Discovery

3) Explore solutions & 4) Develop options

Iterative development of a future design which would achieve our 9 design principles...


Current model:
- Details
- Strengths
- Challenges
- Root cause analysis

Future survey needs:
- Known
- Probable
- Possible

As is

To be
The result: ONS’ future social survey collection design

- New structures and modular, multifaceted roles
- New allocations and case management
- New clearly defined work patterns
1] New structures and modular roles

• Clearly defined, modular roles which encompass our full range of surveys, modes and services
  • Varied and flexible core roles, covering the fundamental capabilities needed
  • Specialisms at higher grades, covering the more complex functions

Benefits

✓ Variety in job content - more interesting roles
✓ Wider development and progression options - opportunities to specialise, in line with interests and strengths
✓ Better capability, capacity and ability to be flexible to changing requirements – better resilience for the business and our people
2] Dynamic allocations & case management

• A community-wide approach to allocating work and case management.

• Improving our use of technology to dynamically manage cases to better meet
  • data collection requirements
  • respondent needs
  • colleague needs

Benefits

✓ Resilience to changing workloads and portfolios

✓ Able to meet respondent availability and inclusivity needs

✓ Performance evaluated on what people do and how they do it – rather than outcomes

✓ Better use of our varied and skilled workforce across our whole survey and case portfolio

✓ Opportunity to create non-interviewing time – for development, meetings, admin etc.
3] Clearly defined work patterns

- All colleagues on a consistent contractual basis
- Contractually protected working and non-working hours
- Work patterns updated at pre-set intervals to match work demand and preferences

**Benefits**

- Attraction of a wider range of people to our roles
- Improved work/life balance - protected non-work time, stability and certainty of hours and work
- Better spread of capacity, and clear capacity understanding and planning for allocations
- Pre-set intervals to review & refresh arrangements → variety for our colleagues and flexibility for the business
- Contract consistency with each other and the wider ONS workforce → better systems, support and simplified processes
The Field Redesign is an ambitious vision. To ensure we deliver benefits to our operation and our colleagues as soon as possible, it has been segmented into two phases:

**Taking a phased approach**

### Phase 1: Two new roles

Introducing two new, more senior interviewing roles.

The roles include:
1. Interviewing + 1:1 colleague coaching
2. Interviewing + larger-scale colleague training

The aims:
- Attraction, retention and progression, by providing more opportunities for promotion than have existed before
- Improved quality – increasing capability and performance quality through the services these roles offer

Progress:

- Role design
- Evaluation
- Pilot
- Mainstage rollout

### Phase 2+: The full redesign

The full redesign – which comprises the modular roles, defined working patterns and dynamic allocations.

- This long-term redesign is a number of years away – and is dependent on several important factors such as funding arrangements and technology developments.
- It is also subject to a huge amount of engagement-led design – bringing colleague views into each element.
- We’re not there yet, as we are focusing on the EO opportunities first.
Thank you

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Reference slides
Abstract

As a result of emerging changes introduced by our ambitious transformation agenda, and, in the face of the increasing challenges experienced in our sector, it was recognised that the social survey field work undertaken within ONS, and the way in which we are set up to deliver this work, need to evolve.

As such, a project to undertake a fundamental re-design of ONS's field operation was established: the Field Redesign. This project has re-examined all facets of our operation, with a view to redesigning what we need to set us up effectively for our future, including:

- our interviewer roles and how these can be modernised to adapt to mixed modes of collection and changing needs
- the contractual arrangements and how these can support the changing context within which we need to recruit and retain colleagues, whilst still supporting in-field work requirements
- our allocations approaches, and how we can exploit technology alongside new contractual arrangements to support our operation.

The presentation will set out the work progressed, the future design we are now working towards, and our progress to date in the Field Redesign project.
Our 9 design principles:

To meet the needs of **our people**, **our respondents** and **our business**, our future community will...

**People**
- Embody a One ONS approach and bring together IPS, TO and Face to Face roles into one community
- Include clearly-defined roles which attract and retain colleagues

**Respondents**
- Have a structure and culture which support colleagues to thrive and deliver service excellence
- Support representative data collection by providing essential services required to reach all parts of society in our surveys
- Be responsive and able to pivot and flex to changing needs (e.g. business, stakeholder, survey and mode needs).

**Business**
- Function in a more efficient and sustainable operation
- Be clear, logical and free of unnecessary complexity
- Deliver value for money and be environmentally defensible
New structures and modular roles

- Modules will be cumulative across grades and will comprise different units of work
  - e.g. telephone interviewing, in home interviewing, passenger site interviewing, knock to nudge, keep in touch exercises, address validation, etc!

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2] Dynamic allocations & case management

Central sample pool

Live allocation & reallocation of field work

One field community

- Ongoing, live, dynamic case management allocated from central pool to field workers
- Cases return to sample pool for re-contact or filtered off as complete.

Sample 1
Sample 2
Sample 3

One field community
Current contractual work pattern – Annualised Hours

- FtF Interviewer colleagues have contracted annual hours – on an annualised hours contract (AHC)

- The current contract states that interviewers’ working availability must cover:
  - Monday to Saturday
  - Regular weekday evening and Saturday working

... in order to adhere to the calling pattern checklist, spread contact attempts and meet respondents’ needs.

- This is no longer fit for purpose
The current thinking is...

1. The working week will be segmented into working blocks

2. Colleagues will have a **contracted number of weekly hours** (rather than per year)

3. Colleagues will have a set of **contracted working blocks**

4. The assigned working pattern **within contracted working blocks** can be updated at pre-set intervals based on business & respondent need, and worker preferences

5. To meet demand, workers may be offered additional hours outside of their designated working pattern and contracted working blocks on an entirely **voluntary basis**.

Note: This is illustrative of the concept. Decisions about any of the details – e.g. working hours, number and duration of blocks are to be confirmed.
Lessons learned

- Organise yourselves first: resist the urge to solutionise immediately...
  - ... but get to the design stage fast
- Bring colleagues in from across the operation...
  - ... but treat developments sensitively
- Do the research ('as is' root cause analysis)...
  - ... but don’t expect the answers to reveal themselves
- It doesn’t need to be fully designed...
  - ... build the house but don’t decorate the rooms

- With a long-term vision, find some “quick wins”
  - People focused - 2 promotion roles
- Think carefully about comms
  - Stagger, tailor and mitigate the grapevine
- Opportunities for questions & feedback
  - Respond with empathy and kindness
- Acknowledge the uncertainty...
  - ... but emphasise the benefits it offers

Communicate - Cocreate - Consult - Collaborate