

# CAPITA



## Cheshire West and Chester: Managing change - the move to a united revenues and benefits department

Revenues and Benefits software from Capita Software Services had been successfully used at Chester City Council, Ellesmere Port and Neston Borough Council and Vale Royal Borough Council for many years.

The three authorities merged together on 1st April 2009, along with Cheshire County Council, to form the new Cheshire West and Chester unitary authority (CW&C), providing services for over 327,500 people. The new unitary authority saw Capita as the natural choice to advise on and supply its revenues and benefits software because of the company's proven strength in this arena.

### The requirement

Jerry Faulkner, Senior Manager, Revenues and Benefits, at Cheshire West and Chester Council, identified key challenges that needed to be addressed in merging the revenues and benefits functions of the authorities.

**"Three separate teams existed from the old local authorities, each running their own version of Capita Revenues and Benefits software. We wanted to unify this into a single system so that we could run a cost effective and efficient service for our customers. It was essential that any new system had to retain all historical records we had and that the implementation process would take place without interrupting services to our customers."**

In addition, two of the authorities had some customer account numbers that were identical meaning that problems with duplicate account histories could be foreseen. CW&C therefore needed to standardise on a new numbering system so that customer account and benefit reference numbers would be unique in the merged system.

There were also subtle differences in functionality; the parameter settings and system codes that each authority used

in the software were not the same. These needed to be ironed out to ensure the data and work processes could be combined successfully.

The Revenues and Benefits system also had to interface with CWAC's other corporate systems such as Oracle Financials and CWAC's chosen electronic document management system supplied by Civica.

### The solution

**"The timescales for the project were tight with only seven months to prepare for the system to go live. To understand the work processes in place at each of the merging authorities, Capita conducted business process and system set-up workshops. These examined how each of our authorities varied in their use of software and provided the information to create a blueprint for the single system solution we required to move forward,"** says Jerry.

Technical consultancy was provided by Capita to procure, build and install all software and hardware at the customer's site. Integration with other corporate systems was also undertaken as CW&C needed to share data with Oracle financial software, a new corporate cash receipting system from Anite and an electronic document management software system from Civica.

Parameters and system codes were aligned and customer reference numbers were re-issued to ensure they were unique. Capita developed bespoke scripts to handle this process and provided consultancy to assist with extensive testing and creating appropriate documentation. Once this process was complete, the authority notified customers of their new reference numbers as part of their annual billing exercise.

CW&C adopted Capita's Payments module to simplify the payment of housing benefits. This was a crucial test for the data migration, as both current and historical information was required to manage payments effectively.

After three test merges were completed, the system went successfully live on time on 6 April 2009. To help support its introduction, Capita consultants were available to assist new users should any issues occur after the launch and floorwalkers were on hand to answer questions as they arose.

### The benefits

"Due to the redesign of the system, a considerable reduction in the amount of manpower has been experienced. There is the possibility that as the system becomes more mature, further reductions may also be possible. The project has already created a more streamlined working environment and the creation of a single system will eventually enable the service to move to a single site," says Jerry.

- Staff can access the system at any of the three sites so can work on any claim from any area
- With mobile working options, Council Tax and Benefit Officers will be able to check and record information electronically in the field, accessing further efficiencies
- Considerable savings in internal ICT support and maintenance are being achieved as there is simply less to maintain
- Increased performance in claimant visits, benefit take up and overpayment recovery has been experienced
- These improvements have been made in conjunction with a reduction in staff, the delivery of an intensive training programme, increased volumes of claims (up to 30%), and a greater number of incoming and outgoing telephone calls
- The new common process model has led to a much easier system for both customers and employees.

"This is one of the principal benefits arising from the project; clear, concise and harmonised customer documentation and a standardised service," reports Jerry. "The automated processes we have introduced as part of the programme remind staff of any required actions, direct documents to the right work trays, and ensure common working practices. Combined with central reporting processes, these systems ensure we can give consistently excellent standards across the new authority."

"The introduction of the new system has seen greater efficiency, cost savings and a single, more responsive service to citizens," says Jerry.

### The future

In the future, CW&C is looking at using Capita Revenues and Benefits' eBilling application to enable Council Tax and Business Rates customers to sign up online and receive their bills via email. Capita's Self-Service software is also under consideration to enable customers to view their revenues and benefits information securely online.

Jerry concludes, "Providing top quality services for our many customers and communities is our main priority and we believe Capita Software Services helped us achieve this. Capita overcame substantial challenges to integrate numerous systems. The partnership with Capita was highly successful and they delivered a system that met all our requirements precisely."

**"Our partnership with Capita went beyond the normal supplier and client relationship. We felt that Capita wanted to achieve our goals as much as we did."**

Jerry Faulkner, Revenues and Benefits Senior Manager,  
Cheshire West and Chester Council

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