CIVICA

Cheltenham streamlines revenues and benefits processes to give customers more choice

Integrating a self-service portal and online forms with its OPENRevenues system helps Cheltenham Borough Council manage work better.

For over 20 years, Cheltenham Borough Council has been using Civica OPENRevenues to manage council tax, non-domestic rates (NDR), housing benefit and more for a population of around 120,000.

"The Civica OPENRevenues system is embedded in our service," says Jayne Gilpin, Head of Revenues and Benefits at the council. "We like its functionality and its flexibility. And being Windows-based, it's intuitive to use."

As part of a transition to more digital ways of interacting with customers, the council had published a selection of forms online for customers to report changes in circumstances affecting their bills and benefits. Although customers benefited from a degree of self-service, many still called the council with enquiries.

And because the forms weren't integrated with OPENRevenues, transferring customer data from the forms to the Civica system was a fairly manual process for the revenues and benefits team.

Scope for further improvement

"To increase efficiency, we wanted the information customers entered online to update OPENRevenues directly," says Jayne. "We also wanted to give customers the option to get their council tax and non-domestic rates bills online instead of by post, and to have self-service access to their account and claim information at any time."

The council decided to implement Civica's OPENChannel and OPENPortal, both of which integrate with OPENRevenues.

OPENChannel

Provides a range of online self-service forms, including change of address, change of payment method, and single person discount (SPD) application.

OPENPortal

Allows customers to see the status of their account or claim, access council tax or NDR bills, and self-serve for enquiries.

Key outcomes:

1 | High volumes of registered online users

2 | Improved workload management

3 | Efficient management of pandemic-related payments

"9,000 people choose online council tax bills"

"We handled pandemic-related business grants and Test and Trace support payments through our OPENPortal and OPENChannel solutions. The timing for having them in place was perfect — we would have struggled to manage the extra workload otherwise."

Jayne Gilpin, Head of Revenues & Benefits, Cheltenham Borough Council

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Increased automation and digitisation allow customers more choice about how and when they interact with the council; and give revenues and benefits officers more time to support those with more complex needs.

"Our revenues and benefits team is small — just 35 people — so our objective was to use technology to help us manage work better, and we've done that. With our Civica solutions, we can offer digital channels for customers who want them, and have more time to provide direct support to customers who need it."

Jayne Gilpin, Head of Revenues & Benefits, Cheltenham Borough Council

More time to focus on customers

The OPENChannel and OPENPortal solutions went live in early 2020, in time to support Cheltenham and its customers during pandemic-related lockdowns, including providing online access to that year's council tax bills.

"We saw unusual patterns of usage in what were extraordinary circumstances," says Jayne, pointing out that there were fewer change of address notifications than usual, as people weren't moving house very much.

"On the other hand, customers in financial difficulties used the online payment form to change payment methods. And for the first time, people could make housing benefit and council tax support claims online, which helped us process the pandemic-related increase in those claims more efficiently."

Because the integrated Civica solution reduced the admin burden, the revenues and benefits team could spend more time on the phone, reassuring anxious customers and answering their questions.

Online take-up on target

To encourage uptake of the online services, Cheltenham uses a number of communication channels including emails and messages on council tax and NDR bills. As a result, online service usage has increased every month. During the first 16 months, nearly 7,000 customers registered for OPENPortal access, and the council recorded more than 30,000 individual logins.

"During the same period, the number of customers opting to access their council tax bills online surged from 2,500 to 9,000, taking us close to our target of 10,000 users," says Jayne. "We also have 500 registrations for online access to NDR bills."

Managing new pandemic requirements

As well as supporting Cheltenham to manage 'business as usual' activities during the

pandemic, the Civica solutions helped to simplify management of new requirements.

"We handled pandemic-related business grants and Test and Trace support payments through our OPENPortal and OPENChannel solutions," says Jayne. "The timing for having them in place was perfect — we would have struggled to manage the extra workload otherwise."

Jayne points out that the business case for OPENChannel and OPENPortal was never about reducing headcount. "Our revenues and benefits team is small — just 35 people — so our objective was to use technology to help us manage work better, and we've done that," she says.

Nor was it about preventing customers from contacting them: "With our Civica solutions, we can offer digital channels for customers who want them, and have more time to provide direct support to customers who need it."

CHELTENHAM BOROUGH COUNCIL

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