

Corporate Services Contract

2021–22 Annual Report and
2022–23 Midyear Report



London Borough
of Hounslow



Winners of IRRV's 2022 Performance
Award for Excellence in Innovation
(Digital Transformation)

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Foreword

Welcome to Liberata's 2021/22 Annual Report & 2022/23 Mid-year Report in respect of London Borough of Hounslow's Corporate Services Contract.

The current contract started on 1 October 2017 and goes on to 30 September 2024, with the option to extend to 30 September 2027. This report sets out progress and achievements over the last 18-months of the contract, which is significant given this period straddles the middle of the pandemic and the immediate aftermath.

The report also has a forward looking context that covers the remaining years of the contract to 2024, setting out a vision & deliverables aligned to delivery and achievement of the Council's corporate strategy Ambitious for Hounslow; as well as an insight into Liberata's aspirations for the potential extension if that were awarded.

Liberata is proud to be a strategic partner to the London Borough of Hounslow, working collaboratively with Council colleagues, adopting the One Hounslow values that shape how we behave and work in an integrated and seamless manner to support the Council in creating and delivering a borough that works for all.

Liberata recognises that we have a role in achieving key elements of the Council's vision and strategy. We have adopted the principles of One Hounslow Working and are committed to putting local people at the heart of our decision making process, co-designing services and using data insight to understand the borough and its residents.

The report shows that most of our key performance indicators are top quartile nationally and for London too. There is also a section on Benchmarking that shows we are top of the class for Revenues & Benefits Services. Our ambition is to achieve the same status across the transactional services for Finance & Accounting as well as Human Resources & Payroll.

There are a range of case studies within the report that show how Liberata has supported the Council, residents and businesses through the pandemic, undertaken ethical approaches to debt collection and delivered excellent standards of customer service, evidenced by a snapshot of testimonials that have been shared in the report under the banner of *Voice of the Customer*.



"This report is a reflection of the success we've had in delivering on our service commitments in partnership with Hounslow Council and its residents over the last two years. We now look forward to further strengthening this partnership for many years to come. For local councils, we continue to be a reliable and trusted operating partner, demonstrating the value of flexible outsourcing and services contracts."

—Charlie Bruin, CEO Liberata UK

Foreword

I commend the report to you and thank you for taking the time to read through it. I acknowledge and thank the Hounslow Client Team ably led by Harminder Persad and Clive Palfreyman – Executive Director, Finance & Resources for their leadership and support.

Appreciation and acknowledgement is also due to all the Liberata staff working on the Hounslow Contract for their dedication, commitment and hard work. The Liberata staff on the Hounslow contract are responsible for the outcomes reported in this report. We are proud to have such a vibrant and diverse workforce in Liberata.

The report sets out how Liberata values, supports and develop staff. We share the career development journey of 2 colleagues in the report who have progressed in their careers since joining Liberata.

Further evidence of Liberata's track record in this area is that we were recently Finalists at the Rewards Gateway Engagement Excellence Awards 2022 in the category of *Best Strategy for Supporting Employee Wellbeing*.

Finally, the report shows that in line with the Council's vision and ambition, Liberata delivers a digitally savvy service and this is evidenced by Liberata's latest accolade of winning the Institute of Revenues Rating & Valuation Excellence Award 2022 for Innovation, specifically for our work on Digital Inclusion. There is a section at the end of the report that covers this in detail. Worth a good read!

Thank you.



Bola Odunsi
Liberata Service Delivery Director for
London Borough of Hounslow

Introducing the Local Management Team



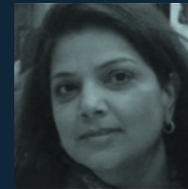
Amanda Inwood-Feld
Regional Director,
London & The South East



Bola Odunsi
Liberata Service Delivery Director
for London Borough of Hounslow



Jayne Henderson-Muse
Service Delivery Manager,
Revenues & Benefits



Karuna Vaghela
Senior Operations Manager,
Finance & Accounting



Mark Stevens
Service Delivery Manager,
Payroll & Pensions



Julie Elks
Service Delivery Manager,
Human Resources & Payroll



Sarah Lyons
Operations Manager,
Customer Services

Monit Joshi
Senior Team Leader, Benefits

Rachel Hutchinson
Senior Team Leader, Benefits

Melissa Vickers
Financial Assessments
Operations Manager

Meenu Sharma
Operations Manager, Customer Financial
Affairs Service

Harkeerat Sihota
Operations Manager, Revenues Recovery
and Customer Experience

Nuzhat Ahmed
Accounts Receivables
Team Manager

Shamila Nawarathna
Accounts Payables
Team Manager

Monica Malhotra
Rent Accounts &
BACs Team Manager

Tariq Elgady & Vicky Bharti
Post Room Officers

Understanding and Aligning with the Council's Vision

The Council's vision for future local government in Hounslow is to operate as a community leader, not simply a provider of services.

Digital Strategy: Keeping the local community at the centre of digital service design

- Services and customers – ensuring services are redesigned to be easy to access and intuitive.
- Staff and workforce – providing all our staff with modern technology and empowering them to work together, enabling a digitally-fit workforce.
- Place and community – enabling a better-connected community.
- Collaboration and data – working as one council to build the future, sharing data and working with our strategic partners across the borough.



Liberata as a Strategic Partner with the London Borough of Hounslow



Liberata is committed to

Shaping our services and training our staff to understand Hounslow's communities and residents as a fundamental element of their role (Reactivate Contact Sheet & Briefing Sessions)

Provide opportunities for residents and businesses to co-design the delivery of services, learning from customer feedback and complaints, consulting on key changes to service policy (tapping into existing focus groups)

Building on relationships forged with local businesses and residents during the pandemic and improve on customer engagement and customer access, improving self service opportunities

Work collaboratively with London Borough of Hounslow colleagues to deliver integrated services to residents and businesses

Maximise opportunities to use customer insight data and experiences to shape the delivery of services and outcomes for local residents and communities

Liberata's Contract Performance to Date

Key Performance Indicators for full year 2021/21 and mid-year 2022/23

Key Performance Indicator	2021/22 Full Year Outturn	2022/23 Mid-Year Outturn	Perf. Direction	Rating
The % of Council tax due that has been collected as a percentage of the net collectable Council Tax debit	96.39%	55.91%	▲	●●●●
The % of Business Rates due that has been collected as a percentage of the net collectable Business rates debit	97.57%	60.02%	▲	●●●●
Value of Council Tax arrears collected during the financial year	£4.35M	2.052M	▲	●●●●
No of working days to process all new claims for Housing Benefit or Council tax Support during the financial year	10.94 days	9.42 days	▲	●●●●
No of working days to process all notified changes in circumstance for Housing Benefit or Council tax Support claims during the financial year	2.73 days	2.35%	▲	●●●●
% of telephone Calls answered by the Call Centre	96.00%	94.30%	▼	●●●●
% of Sundry Debt owed to the Council that is Collected within 60 Days of being due	98.09%	98.28%	▲	●●●●
% of Invoices Paid to Suppliers by the Council within 30 Days of receipt	96.18%	97.48%	▲	●●●●
Payroll Accuracy calculated by taking the number of errors caused by Payroll/total number of payments made	99.97%	99.95%	▲	●●●●
New Employment Contracts issued within 2 weeks of completed employment checks	93.05%	91.50%	▼	●●●●

Liberata's Contract Performance to Date

London Borough of Hounslow's policy decision to go digital by default across the Revenues and Benefits service lines has yielded the following results:

40,000

users signed up (from 107,000 households).

1,600

customers, on average, viewing their account daily.

30%

reduction in calls to the contact centre and average call rate reduced by 30 seconds.

2,000

fewer calls at annual billing than the previous year.

80%

of direct debits completed online.

95%

of new claims for Housing Benefit are submitted online.

70%

(digital by default) take-up and forecast achieving 80% within the next two years.

Liberata's Contract Performance to Date



Service Automation

Using system workflow and robotic automation to deliver:

Universal Credit Automation

99% touchless automation UC change notifications

Recovery Automation

Automating additions to all recovery notices suggesting acceptable payment arrangements

Auto-CiC

Automating 60% plus of changes notified directly to the service

Auto-HBAAI

60-70% touchless automation of HBAAI checks

Auto-VEP

80% plus automation of VEP cases

Auto-Checks

100% accuracy checks with errors investigated and resolved by Quality teams

Unified Assessment Automation

Financial Assessment

Smart online form with RPA auto indexing. This enables the automatic upload of completed applications directly into the Anite DMS without the need for manual intervention

Free School Meals and Uniform Grants

Smart online form with RPA auto indexing. This enables the automatic upload of completed applications directly into the Anite DMS without the need for manual intervention

Housing Benefit and Council Tax Support

Increased usage of the self serve portals which enables customers to submit claims which automatically update the entries in the data fields of the Northgate system, UC automation of around 95%, ATLAS automation of around 98%, RPA auto indexing of any manual applications sent through, e-Notifications, Contact Us forms which now RPA directly into Northgate

Liberata's Contract Performance to Date



Performance

Excellent performance on key performance indicators (with the exception of the call centre). Rectification plan for Contact Centre enabled – this is an area of priority & focus for Liberata.

Benchmarking

Liberata has achieved Top Quartile performance on all Revs & Bens indicators over the last 5 years of the contract.

Resilience, flexibility and versatility

Ability to successfully and securely deliver new government schemes and initiatives such as Test & Trace, Grant payments to Businesses & Utility Rebates.

Successful roll out of Hybrid Mail for Hounslow Council

Take up is 90%+ and increasing year on year.

Implementation of HR Self-service portal

Full roll out within Hounslow Council – more work to do on schools.

Assurance & Controls Framework

Need to bed in the new risk management & assurance framework. Further work required to automate key control functions and make them more robust.

Liberata's Contract Performance to Date



Digitally enabled Technology

Migrating the core processing & document management systems to Software-as-a-Service platforms to enable:

Citizen Access-Revenues — integrated customer portal that automates workflows for Council Tax and NDR

- Citizen Access-Benefits — Providing 24/7 online applications and changes with automated workflows
- Citizen Access-Landlords Providing secure access for landlords to notify changes
- E-Billing/Notifications — Replacing paper bills and letters

Liberata's implementation of the Citizens Access Portal for the Revenues and Benefits service lines is linked to Hounslow's website. It has helped to increase the digital traffic on Hounslow Council's website dramatically.

The increased on-line interaction with residents has led to the following benefits:

- Reduced assessment time for benefit claimants
- Reduced resource requirements in the Contact Centres for both the Face to Face and Call Centre areas
- Reduced resource requirements in the processing areas
- Reduced scanning and indexation costs
- Reduced printing, postage and stationery costs,

Added Value

£10.14 million
additional income generated

Increasing income through Capacitygrid products

Empty Homes Review (Including 2022 YTD)

Fourth year in a row that we have delivered an Empty Homes review

Generated £5.19m in New Homes Bonus funding since 2019

Over the 4 years have reviewed 7,067 properties removing 2,046 at a removal rate of 29%

Performance goes against general trends which have shown a significant increase in Long Term empties across Local Authorities

Single Person Discount Reviews

Undertaken 3 reviews since summer 2018

Increased in-year NCD by £1.60m

Over the 3 years have reviewed a caseload 86,154 SPD's removing 4,229 at discount removal rate of 4.9%

Business Rates Review

Have identified 225 new or amended properties

Rateable Value currently increased by £4.28m generating over £3.35m in additional income

Still have 35 prospective cases with the VOA with an estimated Rateable Value of £359k

Added Value

Increasing income through Capacitygrid products

Empty Homes Review

Year	No. of Properties	Removed Properties	Removal Rate	NHB Funding
2019	700	210	30%	£1,576,556
2020	1,632	489	30%	£919,200
2021	2,250	655	29%	£1,283,259
2022 YTD	2,485	692	28%	£1,411,808
Totals	7,067	2,046	29%	£5,190,822

Single Person Discount

Year	Caseload	Canvassed	Removed	Removal Rate	NCD Increase
2018	27,878	4,591	1,851	6.6%	£664,150
2020/21	29,072	4,726	1,312	4.5%	£522,722
2021/22	29,204	4,261	1,066	3.7%	£415,418
Totals	86,154	13,578	4,229	4.9%	£1,602,291

Business Rates Review

Year	New / Amended	Rateable Value Increase	Additional Income
2020 to date	225	£4,288,250	£3,350,283*

* Includes backdating period and allows for future amendments, multiplier reduction and retention

Benchmarking

Council Tax Collections: Hounslow Performance vs London

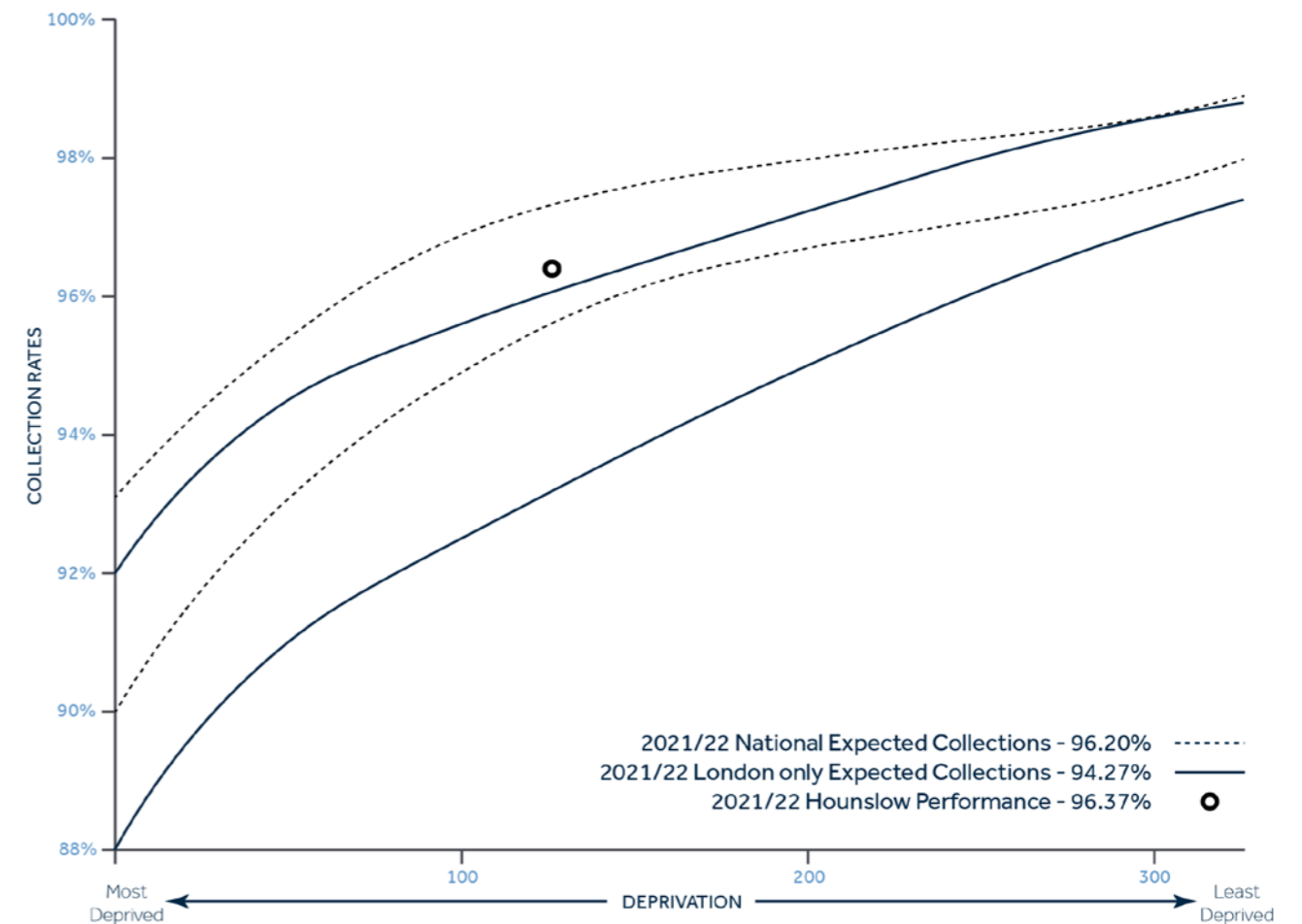
Comparison to London performance:

- 2021/22 – 96.37% significantly above the normal range

Overall London collections were disproportionately impacted by the pandemic and the lockdown response

Collections in 2021/22 were 2.1% above the London expectation equating to £3.045 Million additional collections

Council Tax Collection
Hounslow Performance vs London Authorities



Benchmarking

Business Rates Collections: Hounslow Performance vs London

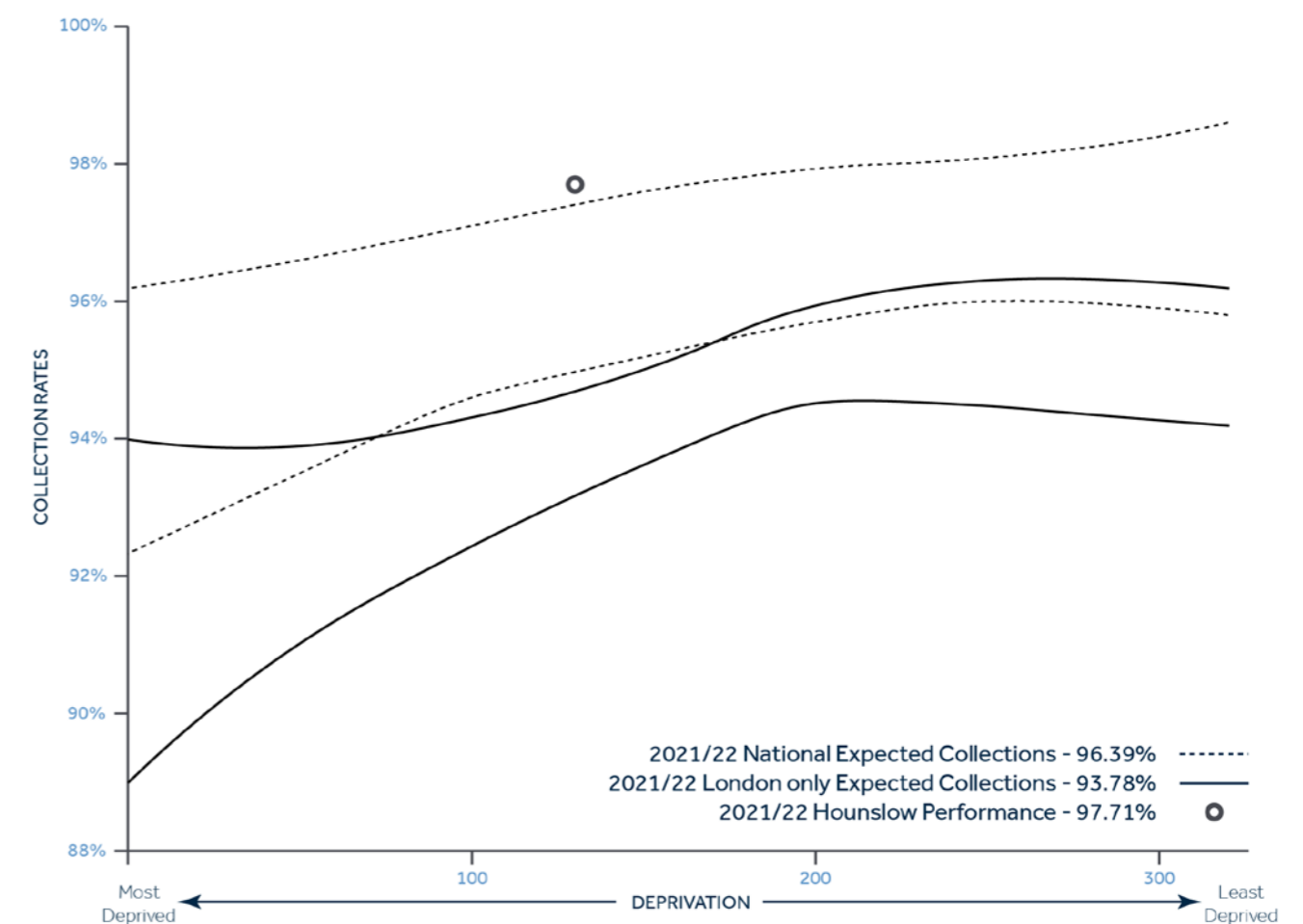
Comparison to London performance:

- 2021/22 – 97.71% significantly above the normal range

As with Council Tax, London collections were disproportionately impacted by the pandemic and the lockdown response

Collections in 2021/22 were 3.93% above the London expectation equating to £6.922 Million additional collections

Business Rates Collection
Hounslow Performance vs London Authorities

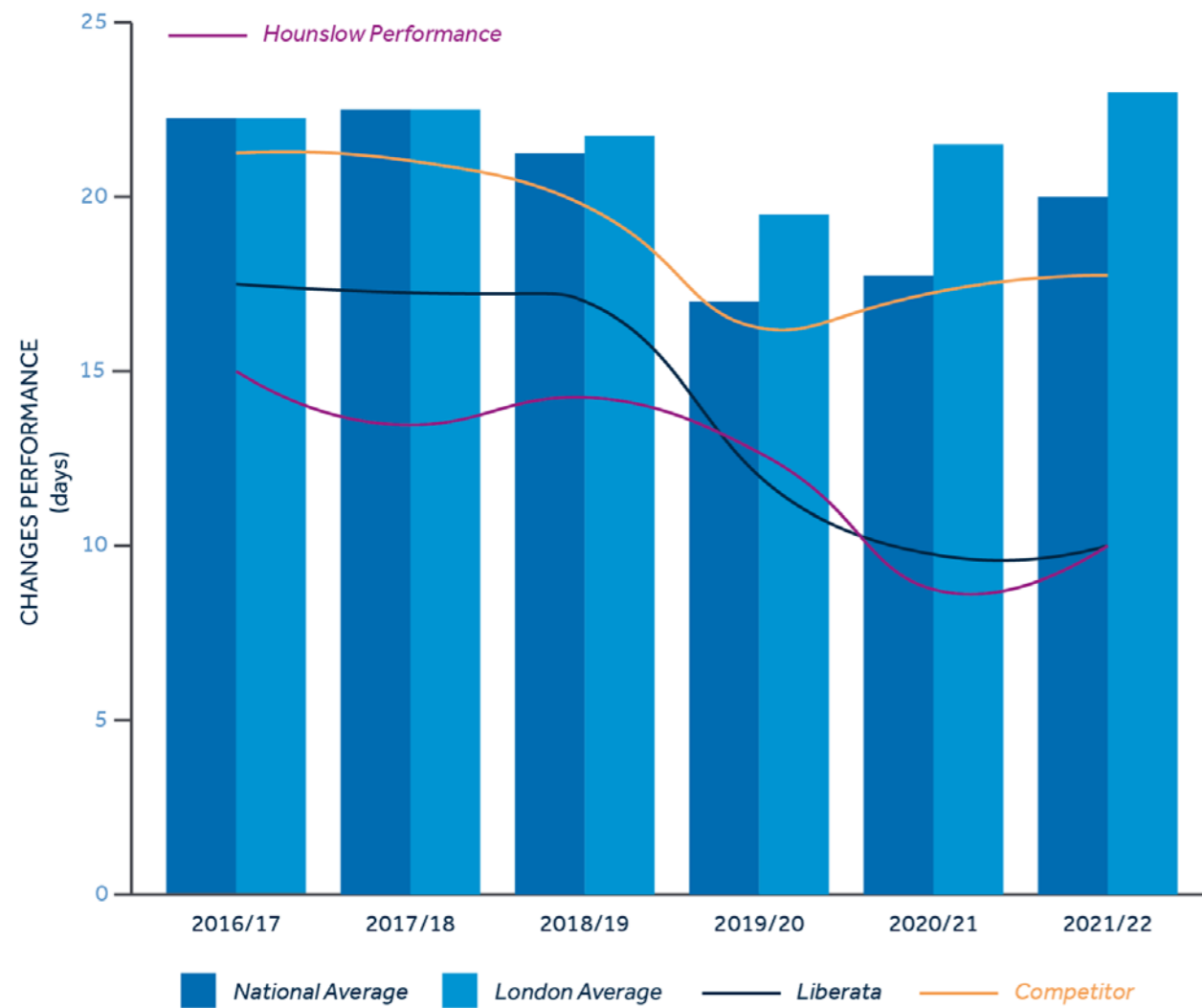


Benchmarking

Benefits Performance: Supporting the Financially Vulnerable

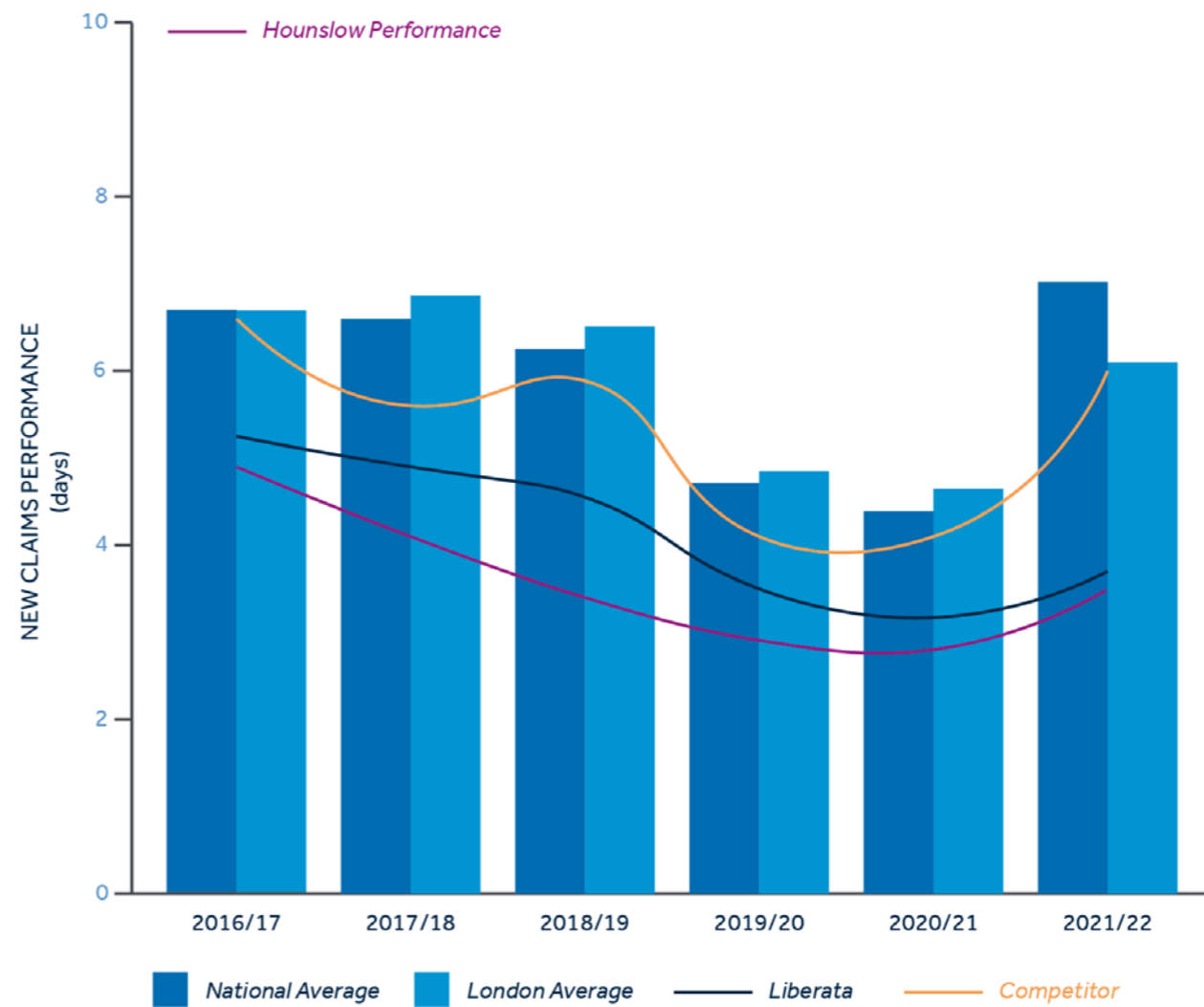
BENEFITS PERFORMANCE

New Claims up to 2021/22



BENEFITS PERFORMANCE

Changes in Circumstance up to 2021/22



Cost of Living and Ethical Debt Collection Case Studies

Support to Residents & Businesses during and after the pandemic – Test & Trace payments, Business Grants & Utility Rebates payments

The Challenge

During the Covid-19 pandemic including the Lockdown period as well as in the period immediately after the pandemic, the government introduced a range of measures to support residents and businesses through that challenging time. A lot of the initiatives had to be delivered by local government and these included:

- Test and trace payments
- Business Grants
- Energy Rebate payments

The pandemic also saw a huge spike in Housing Benefits and welfare support applications at a time when Hounslow council faced unprecedented operational challenges.

The Solution

Liberata, had prior to the pandemic been operating a hybrid working model on the Hounslow contract that meant 50% of staff worked from home at any given time. When the Lockdown was announced, it was relatively seamless to ramp up homeworking to 100% across our workforce.

Thanks to implementing increased process automation and our rapidly rolled-out remote working model, Liberata was able to successfully meet the Hounslow client requirements to implement the aforementioned government schemes in a timely and efficient manner and ensure a good level of service was maintained throughout.

“Covid-19 has presented exceptional operational challenges for local councils and the communities they serve, so we are proud to have assisted our clients as they navigated these issues. As a business, we have also had to adapt quickly to the new remote working model, and we have successfully increased our proportion of home workers from 10 per cent to 90 per cent in just four weeks (in the case of Hounslow it was from 50% to 100% almost overnight). This is a credit to everyone involved who made the transition as smooth as possible, which allowed us to continue supporting our clients with minimum disruption.”

—Charlie Bruin, CEO at Liberata

The Benefits

In 2021/22, Liberata made:

- 1,955 Test & Trace payments of £500 on behalf of LB Hounslow - a total spend of £977,500
- 11,661 payments to businesses totalling £45M worth of Business Grant payments
- 85,380 Energy Rebate payments to residents totalling £12.5M

All of the above was done by Liberata in partnership with Hounslow Council to fulfill one of their key objectives of helping residents and businesses during these times of severe financial challenges.

Cost of Living and Ethical Debt Collection Case Studies

Personal Case Studies

Ms X had recently separated from her husband who used to take care of all the bills and has fallen in to arrears with Council Tax. She called after receiving a reminder notice. The advisor informed her that she would now be entitled to a 25% discount and reset her instalment plan.

"Many thanks for speaking with me earlier. I must say I did appreciate and wanted to thank you for your approach, your willingness to listen and then work through the issues at hand with calmness, clarity and professionalism. It really set me at ease when you worked through to assist which then in turn reduced my anxieties. Thank you."

Mrs X was having difficulty registering online. The officer went through the registration and log in process with Mrs X so that she knew how to log in successfully and then set her up for Council Tax while Mrs X was on the phone.

"I would like to compliment Keisha for her help, patience and efficiency yesterday when I was having problems registering for CouncilTax. A huge thank you."

Mrs X had received a final notice which meant she had lost her right to pay via instalments. The advisor listened to Mrs X and advised her to make the instalment payment to bring the account up to date. She then called her back the following day once the payment was reflecting on the system and removed the final notice and set up a DD.

"She was very helpful and explained to me step by step why I needed to do to rectify the final reminder we had received on our council tax account. She advised me that I would need to call back in a few days to set up the direct debit which I was planning to try to do today. Anu saved me from having to do this as she called me today in order to complete the last steps. I am very grateful to Anu for doing this, as it meant I did not need to try to find the time to call and wait through the automated lines etc. She was very polite and is a credit to the council tax team."

Mrs X was suffering financial difficulty. The officer listened and signposted her to other benefits that she may be entitled to. The officer also advised Mrs X that the reason for her receiving a low amount of Housing Benefit was because her son was not on her claim but rather registered as a joint tenant because he held his own tenancy. The officer advised her to try to get the tenancy changed so that they were both on one, which she did and the claim was then re-assessed and Mrs X awarded a higher amount of HB.

"This lady in your dept has been the most nicest, helpful person I have ever come across ever in The London Borough of Hounslow Departments, I have dealt with many people in my life in a professional and personal capacity and Madgar is outstanding person over the phone, going through things with me, taking time to help me understand. You should be proud she works for LBH, she is an asset that LBH should never loose."

Cost of Living and Ethical Debt Collection Case Studies

Helping Hands Project

Supporting Residents

Working in partnership with Liberata, the London Borough of Hounslow has helped over 2,600 residents struggling to make ends meet with over £235,000 in crisis and household support payments over the last 18 months.

The Challenge

As part of the wider welfare reforms, the Department of Work & Pensions devolved responsibility to Councils for the providing support to local residents who find themselves in crisis. More recently the government asked Councils to provide household support payments to vulnerable households.

The Solution

Liberata has been supplying a range of managed services to Hounslow for many years including the 'Helping Hands' service for residents who make applications for a Discretionary Local Crisis Payment and more recently referrals for household support payments.

Discretionary Local Crisis Payments provide assistance for residents who find themselves in crisis, have exceptional financial pressures, where someone's health is at serious risk, or to help residents stay in or move into their new home.

The officers who assess applications or referrals for crisis and household support payments also carry out a full financial health check with residents who apply to maximise their income through entitlement to welfare benefits, council tax support, discretionary housing payments and they may also sign post them towards free debt advice.

The Benefits

- In 2021/22 over £100,000 in crisis payments have been awarded to 1,777 residents.
- So far in 2022/23 over £145,000 in both crisis and household support has been awarded to 930 residents.
- Residents receive support from food or utility vouchers, furniture or white goods or money for general living expenses where appropriate.

- Helps towards prevention of homelessness, child poverty, supports residents through a very difficult economic climate and contribute towards money into the local economy.

Resident's quotes (anonymised)

"Thank you so much Helping Hands for the award. It will be very well received and appreciated at such a difficult time."

"Thank you so much, you have helped me so much and took a big weight off my shoulders! Thank you"

"I was listened to and got some help, thank you so much"

Case studies

Council Tax Incentive Scheme – Maximising Income to the Council

The Challenge

The London Borough of Hounslow always has an element of static Council Tax debt (i.e. debt that had remained uncollected for over 6 months or more) due to:

- Council Tax / NDR Arrears Low value debt which is below the minimum amount for issuing a summons.
- Debts where a Liability Order has been obtained but cannot be enforced because the debtor has no assets.
- Debts which are below the minimum threshold for applying for a charging order (£1,000) or bankruptcy (£5,000).
- Debts secured by a charge placed on a property where the Council was unable to force sale due to the size of the debt (being less than £5,000) or the personal circumstances of the debtor.
- Debts covered by Individual Voluntary Arrangement's (IVA) & Debt Relief Orders where there is little or no payment being received.

Changes in legislation and Council policy in recent years has resulted in an increase in the level of static debt. The

reduction in the amount of Council Tax Support has led to an increase in high volume but low value debt. In addition, the legal minimum threshold for applying for bankruptcy has increased from £750 to £5,000 which means a taxpayer's debt needs to accumulate above this value before bankruptcy proceedings can commence.

The total amount of static Council Tax Debt as at 31 May 2021 was £22.05M.

The Solution

Liberata as an existing strategic partner to London Borough of Hounslow, having supplied a range of managed services direct to Hounslow for many years, submitted a proposal to the Council to manage and recover this debt on a "risk and reward" basis.

The resulting commercial model (referred to as gain-share model) would see LUK only being able to charge the Council in the circumstances that a debt was successfully recovered.

Liberata created a team of debt recovery specialists, tasked solely to focus on this debt. Using a range of tools including behavioural insights, propensity to pay

indicators and specific recovery methods; the team was able to collect in excess of £3.5M of the £22.05M (15.9%) in the first 6 months of the project.

The approach allowed the staff working on current debt to focus on that and not be distracted by looking into previous years arrears.

The Benefits

- The specialist team collected £3.5M of the total council tax arrears in the first 6 months of operation. This was additional income to the council.
- The £3.5M collected by the specialist team equates to 80% of the total Council tax arrears collected in 2021/22 (£4.34M).
- The scheme allowed other staff to be deployed on to current year's debt which saw in-year collection performance improve by 0.6%, which equates to £0.9M of additional revenue.

Case studies

Former Tenant Arrears

The Challenge

As an authority that still manages social housing for its citizens, Hounslow staff needed to collect rent in a fair and equitable manner and collect rent from former tenants that had left properties owing money.

Previously, the Council had three staff members focused upon this task but that was not sustainable as often the amount of money owed by individuals was relatively low and therefore it was not viable to use key Council assets to try and collect such small amounts or revenue.

However, when this debt was aggregated it represented a significant amount of money, and furthermore, writing it off was considered to be unfair to the majority of tenants that were paying all their rent, on time.

The Solution

Liberata has been supplying a range of managed services to Hounslow for many years, so the Council asked whether their strategic partner would be able to come up with an additional service to manage and recover Former Tenant Arrears.

Using debt recovery specialists, Liberata developed a managed service to recover Former Tenant Arrears on a "risk & reward" basis – the commercial model would mean that a charge would only be made when a debt was successfully recovered.

Liberata offers Hounslow a managed service to identify and recover Former Tenant Arrears that not only collects a high percentage of money owed but allows Council staff to focus on more strategic initiatives.

The Benefits

- £210,000 of former tenant arrears collected in 2021 (to November)
- Service in place for over five years
- Key Council staff redeployed on more critical revenues & benefits work
- Since 2020, Liberata has recovered nearly £500,000 of former tenant debt

"As Hounslow has such a positive partnership with Liberata is was decided to ask for an additional service that would resolve issues around Former Tenant Arrears. Liberata provides the Council with a managed service that has recovered a good percentage of monies owed and allowed my staff to focus on other tasks which has been especially important since the start of the COVID-19 pandemic"

— Harminder Persad, Head Of Revenues & Benefits, London Borough Of Hounslow

Feedback

Voice of the Internal Customer and Client

"I just wanted to let you know Jack has been so helpful to Carol and other team members at Redcar, they really appreciate his help whilst they are working on the Hounslow contract."

—CH

"I wanted to bring to your attention how helpful, pleasant and proactive Shashi is. I have dealt with Sashi on several occasions and I know my managers often say how helpful she is."

—SW

"I just wanted to take this opportunity to drop you an email to express my appreciation and thanks for all the support I have received from Rajina. She has been exemplary in her professionalism and commitment to her role. Rajina is clearly a positive role model for all the work your department carries out; I shall miss her professionalism, loyalty and commitment in ensuring the job/task in hand is completed in a timely and professional manner."

—AM

"Just wanted to make you aware, that we have completed the ASC WDS return for this year. This is a big piece of work, mainly for Jagir Jaggi in Liberata who provides and uploads the data for us and as always she has delivered within the timeframe window. Not sure who her manger is now but would like to say a big thank you!"

—CF

"I wish to bring to your attention what a pleasure it is to be dealing with Aysha Shah. She has been really helpful accommodating, efficient and informative. I do not use the recruitment system often and have experienced some difficulties. However Aysha has been there for me! Often people moan about the system and when things go wrong are quick to highlight and comment, however my experience has been nothing but positive and wish you to inform you of the smooth process and how considerate Aysha has been."

—SW

"I just had my weekly meeting with Harminder and she was very complimentary about your team and specifically Claire H, so I thought I'd share that with you and say well done."

— Bola Odunsi, Service Delivery Director

"Liberata have worked alongside the Council to deliver core services on time during COVID – 19. Liberata were also able to improve their on-line contact forms and used their teams to field these enquiries quickly to ensure residents received the benefits they were entitled to quickly during this difficult time."

— Cllr Shantanu Rajawat, Finance & Resources Portfolio Holder & Council Leader, London Borough of Hounslow

"I would really like you to thank your teams who work with us in delivery. Their contribution is just as valued and just as appreciated as anybody else's."

—Clive Palfreyman, Executive Director of Finance & Resources

Feedback

Voice of the Customer

"I wanted to record my personal thanks to you for the time and effort that you put into investigating my complaint and for keeping me informed at all times for your progress. This has given assurance that our complaint was fully looked into and actioned promptly. I would especially commend Magda and Jack for their professionalism and delivering excellent customer service."

—MT

"Thank you so much for the prompt response and for resolving my query. As discussed I was struggling to get someone to discuss my concern seems like all resolved and I really am thankful for the excellent customer service you have provided"

—MB

"I would like to appreciate your patience the way you listened to my queries and identified the issues. Also you briefed me about council policies completely. Recently I have received council bill and I took a sigh of relief that it was been corrected as requested."

—RH

"Excellent professional handled our account with excellence explained and resolved in a crystal clear language thanks Mr Sheikh and thank you Hounslow Council."

—PS

"Melanie was extremely lovely, helping me with applying for student discount and council tax refund with such a kind, and helpful disposition. As a telephone operator, she was greatly efficient, making the process as simple possible, while still making me feel at ease."

—AB

"Please forward my heartiest thanks to Craig Penn in finally resolving all my issues and, if possible, for forwarding him for commendation. Your Revenue Services Team needs more people like him."

—RJ

"I would like to formally pass on my admiration for the working style of Susan. She has been really helpfully in ensuring that I am kept informed of changes to my salary, and to make sure I have processed it accurately."

—SH

"I would like to thank Anu, she's one of the council tax and housing benefit team. She was very nice today on the phone, very helpful and she was very patient with me when she explained the information I needed."

—MK

"I have dealt with many people in my life in a professional and personal capacity and Madgar is an outstanding person over the phone, going through things with me, taking time to help me understand. You should be proud she works for LBH, she is an asset that LBH should never lose."

—AB

"I am writing to praise an employee of the council who works in the Council Tax department. His name is Mr Pandya. He returned my call this afternoon relating to several queries I had regarding my council tax and my mother's council tax. He was extremely helpful, professional and courteous. He is a real asset to the department and I feel this should be recognised. It is so refreshing to deal with a person of his calibre and professionalism."

—FG

Supporting and Developing our workforce

At Liberata, we are committed to developing and supporting our staff.

One of the ways we do that is through our wellbeing strategy which is a long-term programme to engage with and support our people in improving their physical, mental and financial wellbeing enabling them to lead productive and healthy working lives.

Our strategy is aligned with our Corporate Responsibility Policy and adheres to the guiding principles of:

Equity

Activities are accessible to all employees

Equality

Activities take account of individual needs and respect everyone without discrimination

Participation

People are encouraged to participate and have some input into the process

Empowerment

Colleagues are involved in shaping our plan and invited to provide feedback

Community

Giving back and supporting the communities within which we live and work

We conduct annual surveys to capture feedback from our employees. Please see some extracts from our 2021 staff survey:

Supporting and Developing our workforce

Feedback on the last 12 months.

Things that were positive



Not having to commute

22% commented on this



Flexibility of working from home

14% commented on this



Enjoy working from home

12% commented on this



Improved work/life balance

11% commented on this



The purpose and routine of work

9% commented on this

Things they would change



Wouldn't change anything

14% commented on this



Flexi time

13% commented on this



Communication with colleagues

9% commented on this



IT connectivity and system issues

9% commented on this



Work/life balance challenges

9% commented on this

Changes they would keep



Continue to work from home

32% commented on this



Choice of home or office working

21% commented on this



Use of MS Teams

10% commented on this



Meetings and communication

8% commented on this



Wouldn't keep anything

8% commented on this







Supporting and Developing our workforce

Communication, management and wellbeing.

Communication overview

- 
80%
 Agree that relevant information reaches them on a timely and regular basis
- 
86%
 Agree that they receive regular team briefings
- 
68%
 Agree that they have been able to stay in regular contact with colleagues
- 
71%
 Agree that the introduction of MS Teams has been positive
- 
62%
 Agree that, overall, communication in the organisation has been good

Communication methods

- 
91%
 Felt email updates over the last 12 months were very or quite useful
- 
78%
 Of those who completed online courses, the % that found them very or quite useful
- 
62%
 Of those who attended webinars, the % that found them very or quite useful
- 
59%
 Of those who used the Khub, the % that found them very or quite useful
- 
54%
 Of those who attended employee forums, the % that found them very or quite useful
- 
40%
 Employees who did not attend an employee forum over the last 12 months

Management and wellbeing

- 
82%
 Agree that they have felt connected to their line manager over the last 12 months
- 
83%
 Agree that they have had the support they needed from their line manager
- 
86%
 Agree that they have felt trusted by their line manager over the last 12 months
- 
37%
 Reported their mental health getting a little or a lot worse over the last 12 months
- 
38%
 Reported their physical health getting a little or a lot worse over the last 12 months
- 
81%
 Strongly agree or agree that they have been able to balance work commitments and home life

Supporting and Developing our workforce

Recruitment and Retention

Liberata is committed to investing in local jobs for local people where our Business Model allows us to. Our customer facing roles and a high proportion of back office roles are occupied by locally based staff, who we continue to develop in with a number of staff successful in obtaining new roles within the organisation.

Here are examples from a couple of our staff who share their story on their career journey within Liberata UK Ltd.



Sandeep Arora
Senior Team Leader, Customer Financial Affairs Team

I transitioned to Liberata in 2017 and was operating as a Senior Customer Financial Officer for the Customer Financial Affairs Team. Through my own personal development plan I identified key areas of development in my core skills. Learning and development opportunities are always available in Liberata and over the years it has enabled me to grow my skill set, strengthen my people skills and grow as an individual.

In 2022 I took on the role of Senior Team Leader, this involved not only managing my current Customer Financial Affairs Team but also taking on the Visiting Team. The transition was smooth as I felt ready for the change and wanted to be challenged differently.

This opportunity has enabled me to widen my scope of the business and cross work with a number of different areas and key stake holders.

Since taking on the new role I have been supported by the leadership team and have enhanced my knowledge through various training modules, such as the five part Building Leadership Skills course. I have found the training to be a great help in creating foundations for me to build off.

One of the benefits of working with Liberata is there are so many prospects for growth – you just have to grab the opportunity with both hands and embrace it

Supporting and Developing our workforce



Hina Mohamed
Marketing & Propositions Manager

With a degree from the University of Arts in London, I came to Liberata following a 13 year career in the field of marketing but circumstances had changed in my life after having my first baby.

I joined Liberata's Hounslow Team via the Finance and Accounting Transactional Service Line, working initially in the Accounts Payables Team as temporary member of staff. I was welcomed with open arms and given the tools to establish my foundation and progress.

I went from being an Accounts Payable Officer on a basic zero hour contract to becoming a Debt Recovery Officer on a fixed term contract as maternity cover for someone else.

I was then given an opportunity to join the Customer Financial Affairs team on a permanent contract where I further evolved.

Shortly after, a job opening for a Marketing Manager was advertised within the company and I jumped at the chance to get back to my passion. I was successful in getting the role of Marketing & Proposition Manager, which is my current role.

Liberata encouraged my transfer and celebrated my journey and I was lucky to have nurturing seniors to help guide my progression.



Liberata was shortlisted as Finalists in the 2022 Reward Gateways Excellence Awards for Staff Engagement

Liberata's Enablers To Achieve The Council's Vision To 2024 and Beyond

- Further roll out of Digital Technology & keeping the customer at the centre of digital service design
- Implementation of Phases 2 and beyond of the new Genesys Telephony Platform
- Benchmarking – Keeping service performance at Top Quartile
- Social Value, Place & Community Engagement
- HRP Service Improvements & Innovation
- Transformation of F&A Services



Specific Technologies

Developing a Preventative Service Model

Active Assessments / Implementations

Specific Automations

- Auto-MED
- Auto-Change in Circumstance
- Auto-Recovery
- Auto-HBAAI
- Auto Quality Checks

Omni-channel Contact Platform (Genesys)

- Conversational IVR
- In-queue channel deflection
- Multi-channel conversations
- Speech to text analytics
- Enables unified analytics with line of business systems

Future Considerations

Unified Debt Management system

- Council Tax / NDR Arrears
- Overpayments
- Sundry Debt
- Current & Former Tenant Arrears
- Social Care

Predictive analytics

Machine Learning

Voice automation skills

Further Automation of Unified Assessment Service

What is due to be implemented

Financial Assessment

RPA auto indexing of customer evidence and Contact Us forms will remove the requirement of an unstructured email being sent and instead allow for data to be provided in a structured format to enable further RPA to be explored.

Free School Meals and Uniform Grants

Once process is agreed with the Education Department, we will implement the core data set from Education system onto Anite DMS, which will enable brand new applications to also benefit from RPA auto indexing as well as general auto indexing of all evidence received.

Discretionary Local Crisis Payment

A new back office Cloud database is being built by our Solutions team as well as a smart online application form. Once live, this will transform this service and also enable for greater reporting capability and a structured approval channel. This will also mean that Hounslow Council will no longer have to pay Northgate licensing costs each year for the existing portal.

Housing Benefit and Council Tax Support

Continue the rollout process of full automation of medium to low risk CTS claims, investigating the ability to automate low risk HB claims, RPA of HBAAI to mitigate the negative impact on processing times.

The afore mentioned automations will speed up the processing time for all the benefits/assessments listed, which means quicker response times for our customers and getting them the financial help they need in a more timely manner

Customer Contact Transformation – Current State and Driver for change

Current state

Current Mitel telephony platform lacked multi-channel customer engagement and access, and had no Chat Bot/AI capability

Driver for change

A need to provide customers with a **choice** of how they engage and access your services using the communication channels of their choice, at a time of day **that is convenient to them**, in the knowledge that all their communications are joined-up

Customer Contact Transformation – Deliverables

Liberata will implement a new technology platform for all your services contracted with us

This is a year-1 investment of over £400k to on-board the new technology. The new platform will:

- Offer a full omni-channel (i.e. telephone, web chat, email, social media (e.g. WhatsApp), MMS, SMS and video calling) experience to customers
- Provide a 24/7 conversational IVR with Voice Bots (integral to your IVR)
- Provide a 24/7 conversational Web Bot (complementing your web site)

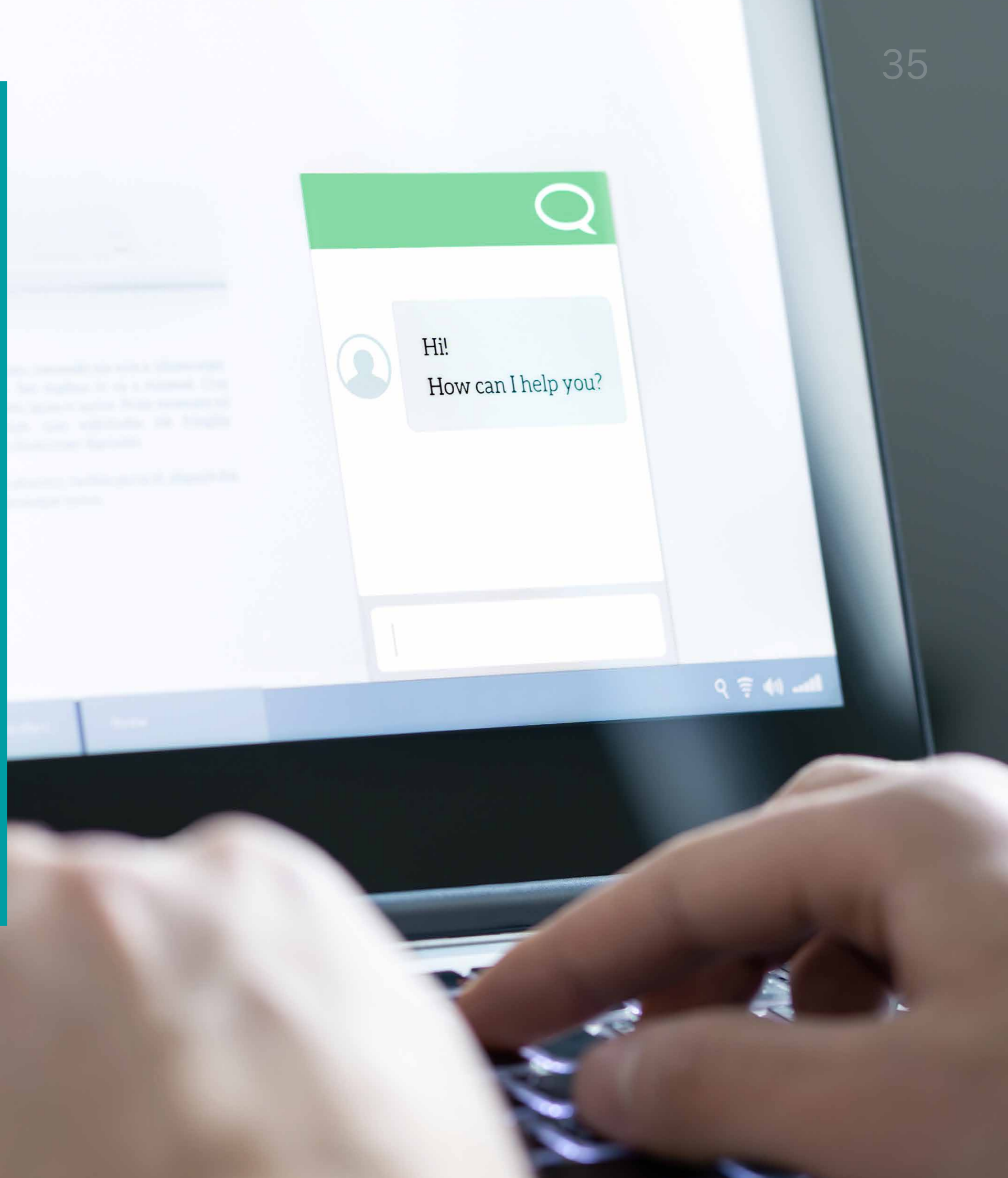
Both forms of the Bot will handle customer engagement from simple sign-posting to data capture, and during normal office hours provide hand-offs to agents to support vulnerable customers and/or complex queries

The new technology has the potential to:

- Analyse every contact/conversation using Speech to Text Analytics
- Automate your Switchboard services
- Integrate captured data using RPA (Robotic Processing Automation)

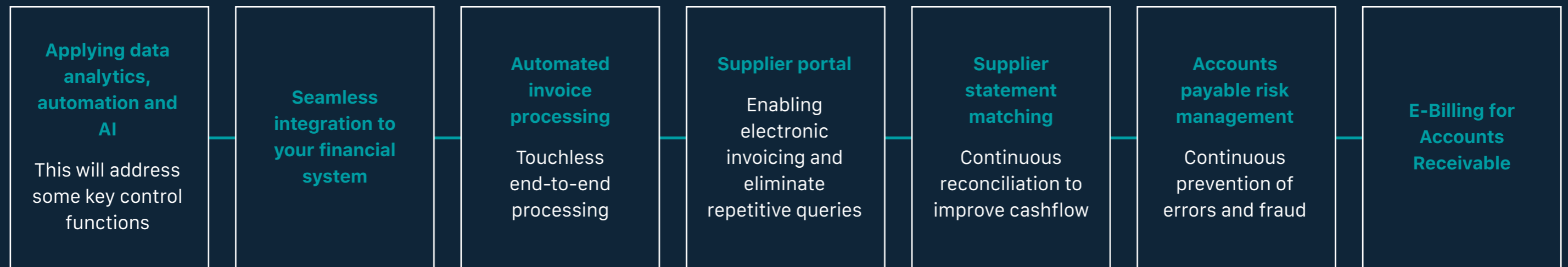
Liberata's Chat Bots

- Liberata has produced detailed definitions for each service line's query types
- The Bots will be built with comprehensive knowledge from day one
- The Bots will improve with human assistance and AI machine learning
- The Bots will answer and resolve simple customer questions and requests allowing agents to focus on more complex issues
- The Bots will improve the chance of on-line forms being completed accurately by offering assistance
- The Bots will increase number of customers asked to complete a customer satisfaction survey



F&A Roadmap 2022–2024

Specialised, cloud-based,
F&A solutions delivering
smarter outcomes



HRP Proposals for the next two years and beyond

- Roll out of HR Portal to remaining schools within Hounslow Council.
- Option to implement Wagestream – this is a MHR module that would support the financial wellbeing of Hounslow Council staff. Offers include flexible pay (mid-month payments due to employees claiming hardship during these difficult times), vouchers, coaching on financial matters, tracking and budgeting.
- Payroll Solutions Lead
- Interactive Payslips
- On-boarding (and Recruitment)
- Bank Account Validation
- Case Management
- Future MHR Enhancements which include Survey Builder and Form Builder modules



Social Value

Options for the next two years and beyond

Funding Local Projects To be spent on:

- Sports team sponsorship & kit
- School reading programmes
- Healthy eating workshops in Hounslow Council schools

Capacitygrid Academy Covering:

- Apprenticeship programme – two per year
- Graduate Programme - Recruiting IT graduates to become automation developers
- Work Placements
- Job Skills & CV Builder workshops (with Renovo)

Local Recruitment New Liberata roles advertised first in Hounslow where feasible

Volunteer Programme Raising awareness amongst Liberata staff in Hounslow and encouraging commitment of 2 days per person per year

Mentoring Schemes

Business Support Including:

- Professional Support to volunteer groups – Board membership etc.
- DBS Services

Corporate Services Contract Operational Plan 2024 -2027

Propensity to Pay Enhancement

Using customer segmentation and predictive analytics to optimise payment mechanisms, customer contacts and support to maximise collections

Unified Data Services

Using predictive analytics and machine learning within aggregated datasets to identify service improvements and un-claimed entitlements

Automation Programme

Building additional automations supporting future service changes

Transformation

Fully Digital Service delivered via Going Digital

Optimisation of Omni-channel contact solution (Genesys) including:

- Chat & Voice Bots
- Voice biometrics
- Speech to Text analytics
- Conversational IVR

Intelligent Automation including:

- Existing – UC Automation, Auto-Indexing, Auto-MED, HBAAI, Auto CiCs, Auto-Quality Checks
- New – Auto-DERs, Auto-Updates

Arrears & Static Debt projects – further enhanced

Enforcement Optimisation (CDER)

Capacitygrid products - continued implementation including:

- Discounts & Exemption Reviews
- Council Tax Maximisation
- Business Rates Review
- Cloud Tools

Benefits Of Liberata Delivering The CSC Contract For 2024-2027

- ▶ Excellent & trusted partner with top performing contracts – evidenced by Customer experience, benchmarking & KPIs in top quartile
- ▶ Provider of cost effective range of services – providing value for money, delivery on efficiency savings & contributing to Hounslow Council's MTFS
- ▶ Automation & Innovation - Reference site for Automation & innovative work practices
- ▶ Financial benefits of Liberata's CapGrid products – only available from Liberata
- ▶ Hounslow Council will benefit from being part of a wider London network of clients
- ▶ Benefit from the expertise and resilience from Liberata's Shared Service infrastructure located across the UK
- ▶ Pilot site for most of our innovations – benefit from innovative and leading edge technology
- ▶ We are working towards supporting the community wealth building agenda & being community champions
- ▶ Liberata supported Hounslow Council in its response to the pandemic through the roll out of Grants, Test & trace payments and other government initiatives. Hounslow Council can rely on Liberata's Resilience, flexibility & versatility
- ▶ Liberata – emerging market leader for outsourced Revs & Bens services
- ▶ Underpinned by a Robust & Agreeable Financial Plan that delivers value for money & supports Hounslow Council's MTFS

Recognition By Our Peers In The Revenues & Benefits Industry

Liberata – Winners of IRRV's 2022 Performance Award for Excellence in Innovation (Digital Transformation)

With the business awards season back in full swing, we are thrilled to announce that Liberata has scooped a major award at this year's Institute of Revenues Rating and Valuation (IRRV) Performance Awards.

Liberata won the Excellence in Innovation (Digital Transformation) award in recognition of our wide-ranging Revenues & Assessment transformation programme – 'Going Digital'.

The awards panel selected Liberata for its first-class implementation and delivery of the programme, which has resulted in outstanding R&A service performance and significant cost reductions for local authorities.

The Institute of Revenues Rating and Valuation (IRRV) is a prestigious national body which promotes best practice in the fields of local taxation, benefits, and valuation.



Recognition By Our Peers In The Revenues & Benefits Industry

Competition for the annual Excellence in Innovation award is fierce amongst organisations and being one of the shortlisted three is always a proud achievement in itself.

But Liberata was singled out by the panel for the scope, scale, and success of its digital transformation programme. From 2019, our Going Digital initiative has tackled a wide range of local government challenges in the delivery of digital transformation by:

- Identifying the art of the possible in R&B digital services
- Myth busting the blocks to effective digital transformation
- Optimising access and service channel use
- Extending service toolkits and their use
- Tracking service digitisation across channels and touchpoints
- Automating service delivery

We achieved this excellence in delivery by investing heavily in key skills and capacity to get the best out of core toolkits, driving a marginal gains approach in all aspects of service and delivering key bespoke developments through a digitally transformed RPA platform with associated automations.



Our Going Digital programme has delivered truly staggering results, with five of the local authorities we work with recently being highlighted amongst the fastest councils in England to process housing benefit claims.

Liberata's award win is a fantastic achievement, made possible by the dedication and hard work of our talented teams.

Although the Going Digital programme was officially launched in 2019, our journey really started three years previously, when we put the building blocks in place to enable clients to digitally transform. We then evolved from doing this on a client-by-client basis to delivering a much larger economy of scale.

Being ahead of the curve with digital transformation enabled us to quickly work on all Covid grants when the pandemic hit in 2020. We ensured a seamless transition for local authorities under extreme pressure, adapting to the changing demands of the service to deliver exceptional support.

We are extremely proud of the achievements we have made in recent years, and this award is a testament to the value we have provided to local authorities and their residents.



EXCELLENCE IN
INNOVATION
(DIGITAL TRANSFORMATION)
Liberata

Winners of IRRV's 2022 Performance
Award for Excellence in Innovation
(Digital Transformation)