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Simon Bailey IRRV (Hons)

Profile

Fully qualified IRRV professional who has undertaken several head of service and management roles in local taxation, benefits and ancillary services such as cashiering/sundry debtors.

Key skills in managing change especially in relation to the current and emerging welfare reforms and how they impact on authorities. Managing those impacts and de-risking the implementation of those changes.

Particular skills in utilising new technology within revenues and benefits and often delivering papers and tutoring on IT within revenues and benefits to students and other managers. Undertaken a BPR exercise for a major document-imaging organisation within a large unitary authority and has implemented a document imaging/workflow system for a London Borough. Has implemented the IBS open system and workflow into a medium size shire district.

Regular contributor to IRRV Insight and Benefit magazines on technology issues.

Key experience of core revenues and benefits systems including Anite@work (Northgate) and project management of such systems to successful implementation. First hand experience of implementing mobile working, and undertaking web site reviews.

Considerable experience in managing and supervising revenues and benefits departments including an interim management role with an authority, winning the in-house contract and implementing the contracted service.

Managed a revenues and benefits service for a large Greater Manchester authority that had been outsourced.

Prepared and financially modelled the efficiency saving for partnership working between three Dorset authorities. revenues and benefits services. Presentation of the report to leaders and Chief Executives. Subsequently project managed the implementation of the partnership including the formation of and the chairing of working parties relating to HR, IT, Finance and Governance. Creation of project plan and management of the plan. Exploring TUPE and other staffing issues, IT implications, financial implications and reporting methodology for the partnership.

Significant experience in revenues and benefits shared services pre and post implementation.

Operates through his own limited company (ISCAS LTD) since 1998

Experience

October 2019

Red Quadrant Consultancy

Consultant – Options Appraisal for Revenues and Benefits

Options appraisal for a North West authority as to possible outsourcing, shared service and in-house provision for their Revenues and Benefits Service.

Commentary was also provided on the suitability of the Key Performance Indicators and performance against those indicators by the outsourced provider.

October 2018 to December 2018

North Warwickshire Borough Council

Project Manager

Project management of the final phase of an Academy to Civica Revenues and Benefits system conversion

Included management of all project documentation and reporting to Project Board and Teams on progress

Maintaining close liaison with the suppliers and managing risks and issues as they arose

May 2018

IRRV Scotland

Web Site and Social Media Course - Trainer

Provided the 6th Web Site and Social Media Course in Revenues and Benefits to authorities in Scotland.

This one day workshop reviewed websites and use of customer access channels for revenues and benefits and welfare reform.

The days included short presentations on implications of good and poor websites, efficiency savings, use of social media and improving the customer's experience.

Practical exercises and short presentations allowed attendees to participate in the day and provided food for thought on improving their own websites and social media communication plans.

This workshop was updated to reflect latest technologies and is invaluable

for all authorities wishing to provide the best digital experience for their benefits and revenues customers

January 2018 to March 2018

Cambridge City Council

Revenues and Benefits Options Appraisal Consultancy

Provided Cambridge City Council with an independent options appraisal in respect of their award-winning Revenues and Benefits Service. The appraisal was required in light of the changes affecting the service especially in relation to the introduction of Universal Credit (UC) and the shared service agenda

The authority used the report in formulating its service plan and structures going forward.

Aug 2017

Nuneaton and North Warwickshire Shared Service

Single System Support – Consultancy Support

Provision of support in the creation of a single system Revenues and Benefits specification

This included working with colleagues by the setting up and facilitation of working groups to formulate a full system specification.

June 2017

Tewkesbury Borough Council

Appointment of Head of Service –

Revenues and Benefits Consultant

Provided technical assistance to the Assistant Chief Executive in the appointment of the Head of Revenues and Benefits including the interviewing of candidates and providing feedback

The authority requested a “fresh to the scene” view of their candidates from an external source. This was provided by way of verbal reporting to the Chief Executive on the interview day.

May 2016 to August 2017

Bromsgrove and Redditch Shared Service

Single System Project Manager

Project manager overseeing the implementation of Civica Open Revenues, Open Workflow and Open Channel into the Revenues and Benefits shared service.

Included management of all project documentation and reporting to Project Board and Teams.

Maintaining close liaison with the suppliers and managing risks and issues as they arose

The role was more of an implementation manager with on site support on technical aspects provided as required

May 2016 to June 2016

Oxford City Council

Housing Benefit Overpayment Review - Consultant

Commissioned to undertake a review of Housing Benefits Overpayments to include

An investigation of HB overpayments to establish a baseline and provide management information on which to base future actions.

A review of IT systems

Identifying reporting requirements

A review of working practices.

Reviewing the resources being applied to the recovery of overpayments.

Developing an action plan which will provide a route map for future activity by the authority.

February 2016 to July 2016

Tewkesbury Borough Council

Financial Inclusion Project Consultant and Project Manager

Developing a coordinated response to the Welfare Reforms including a project methodology aimed at making best use of resources in the introduction of the reforms.

This included working with external stakeholder and internal teams to reach the desired outcome

Management of meetings and providing support to the internal teams to develop the authority's approach to the Welfare Reforms

March 2012 to December 2015

Milton Keynes Council

Programme Manger – Welfare Reform

Successfully implemented Council Tax Reductions and Local Welfare Provision into Milton Keynes Council.

Project managing other Welfare Reform changes including size criteria, benefit cap and Universal Credit

Data analysis of current caseload, mapping and understanding need / demand, modelling possible schemes and options.

Co presenting information to any project boards / members.

Understanding and assisting in modelling for technical reforms and inter-relationship with, local council tax scheme.

Preparing and delivering briefing papers to Members and stakeholders

Working with the authority in communication / publicity. Creation of publicity material and managing the communication plan.

Holding user forums / feeding into existing forums

Completing all necessary documentation for MK Project approach

Drafting reports / cabinet reports, reports for Council, etc

Drafting Equality Impact Assessments

Working on consultation strategy and implementing the consultation processes

Working with software suppliers to ensure any proposed schemes can be delivered by the software

Assisting in developing staff procedures and guidance

Working across the Partner sites and across neighbouring sites / sharing information.

March 2011 to March 2012

Peterborough City Council

Outsourcing advice and services

Preparation of specifications for Revenues and Benefits and Customer Services.

Advice and guidance on performance measurement, volumetric measurement and reporting requirements.

Member of a project team assisting in the dialogue between bidders and the authority.

Evaluation of bids and scoring accordingly.

Worked with the new partner during the mobilisation stage

Retained to assist with client-side activities, after contract start.

July 2010 to Aug 2010

Watford and Three Rivers Revenues and Benefits Shared Service

Review of Shared Service

Review of the recently formed shared service between Three Rivers and Watford Councils

The review covered

- NNDR & Benefits reconciliation: process review, gap analysis and gave recommendations
- Quality assurance of processes feeding into housing benefit subsidy claim with a gap analysis (weaknesses), and provided best practice, recommendations.
- Billing and recovery procedures and policies highlighting support needed current issues and provided recommendations.
- Review of the Benefits backlog: and workload management, benchmark level of staffing resources and provided commentary on, complaints handling and customer care
- Reviewed the Benefit service case load management, benefit officer performance and quality assurance.
- Reviewed systems and service issues that required urgent attention.

December 2008 – September 2010

Eastern Dorset Partnership

Consultancy Project on Revenues and Benefits Shared Services

Development of a business case and review of revenues and benefits partnership for three Dorset authorities.

Using data provided by the authorities undertook the preparation of business case and financial model.

Project managing the review and chairing working groups in:

- Human Resources
- Information Technology
- Property
- Finance
- Governance

Collation and assimilation of data from all three sites to forecast potential savings, costs and efficiencies.

Presentation to Leaders and Chief Executives of findings for one site and three site options and potential implications for outsourcing the service.

After the partnership model being approved, retained to drive forward the partnership until the appointment of the Head of Service and go live date of 1st October 2010

Presentation to staff across all three authorities on the partnership methodology, timetable and implications for those involved.

April 2010 to May 2010

Canterbury City Council

Review of Benefits Web Site

Production of a report that highlighted areas from both the customer's and an inspector's point of view for improvements to the Canterbury Benefits Service web site

Measuring the website against KLOE inspection reports to identify any areas where the site could be improved.

The report was based upon:

- Accuracy and currency of the site
- The level of information provided
- Depth of data provided
- The presentation of the data
- The navigation of the site
- The accessibility of the site.

Present the findings in a workshop environment with representatives of the Benefits Service. From that workshop creating an action plan to develop and improve the overall content and design of the website.

January 2010 to April 2010

Cannock Chase District Council

Local Taxation and Benefits

Assisting Head of Local Taxation and Benefits

Specific projects including

- Preparation for KLOE – Gap analysis

- Web site improvement
- Writing of recovery policies
- Preparation of Service Level Agreements for Housing Benefits
- Preparation of document retention policy
- Maximising use of the Anite document management system
- Procurement of E Forms
- Piloting home and mobile working
- Advice on partnership working.

March 2009 – December 2009

Unity Partnership – Oldham Council

Interim Director of Exchequer and Access Oldham

Responsible for the Unity contract relating to Revenues, Benefits, and Access Oldham/Exchequer Contact Centre

Engaged to cover maternity leave of the current post holder

Client facing role, KPI negotiation and reporting

Service improvement and performance management.

Improved performance for right time indicator from 17 to 4 days in just 3 months.

Leading and management of service improvement project relating to Revenues and Benefits.

Led the service through significant change in ethos.

Maintenance of budgets and efficiencies.

Preparation for KLOE and ISO quality standards audits.

Review of use of technology, including Academy an Iclipse document management system.

Service representative to Members and Key Officers within Oldham Council at Senior Leadership Team and Senior Management Teams.

Undertook restructure and implemented new working methods.

Obtained ISO9001 for the Directorate.

Reporting to Unity Managing Director

January 2008 to March 2009

Mouchel Business Services (Formerly Hyder Business Services)

Consultancy, advice and support – Revenues Consultant

General consultancy support to the revenues service at the Milton Keynes, Oldham and Middlesbrough sites

- Implementation of the changes to Empty Property Rates
- Review of recovery and collection procedures
- Reviewed and created business plan/time line
- Review of Anite@work reporting
- Assisted in interim management of the service
- Creation of performance management reports
- Review of systems over other Mouchel sites at Oldham and Middlesbrough
- Preparation of reports for HR issues
- Worked across all 3 sites developing a “value stream” to facilitate joint working
- Part of KLOE preparation team working with client in KLOE return
- Preparation of strategic action plans for “intelligent” take up and overpayments.
- Web site improvement project – developing the web site for revenues and benefits

September 2006 to April 2007

Fareham BC

Consultancy, Advice and Support

Following on from interim management role, retained to provide general advice and support, on and off site, to the recently appointed Head of Benefits

October 2006 – January 2007

Cambridge City Council

Review of the Revenues and Benefits Services

Conducted a brief review of the Revenues and Benefits Service to include

- NNDR
- Council Tax
- Housing and Council Tax Benefits

Examined costs, from benchmarked data, considering value for money versus service levels

Examined procedures and working practices within the service, identified service cost efficiencies that could be generated whilst maintaining PI performance.

Reviewed performance within the service and commented upon benchmarked data and sustainability in the context of changing environments.

Reviewed the structure and resource requirements in delivering the service.

Reviewed customer contact and how this impacted on the Customer Access Strategy.

A full report was delivered on time and within agreed costs.

April 2004 to August 2006

Fareham BC

Head of Benefits

Appointed to review benefit service and improve on poor performance.

Removal of backlog from 900 claims to 180 in 6 months

Led service from bottom quartile to top quartile for new claims processing

“Excellent” authority score for National Performance Standards

Developed effective service policies and procedures designed to support the Council's values and organisation development strategy, service and business aims.

Continually reviewed, developed and promoted processes, practices and procedures, ensured they were robust to achieve the optimum benefit from technology and employees

Prepared, implemented, monitored and reviewed a service improvement plan

Maintained performance against the National performance standards

Implemented BFI and audit recommendations.

Interpreted and implementing changing legislation and government policy

Ensured all subsidy claims and statistical returns to Central Government were made to central government and were accurate, submitted on time and where applicable receive an unqualified audit opinion

Managed a team of employees, ensuring that they are recruited, developed, supported, informed and motivated to achieve work objectives and optimum productivity and that their performance was monitored against agreed criteria.

Monitored and controlled costs in line with the Council's Standing Orders and Financial Regulations

Improved, developed and evaluated the level of service satisfaction to claimants/clients

Increased options available to claimants/clients re contacting and undertaking transactions with the Council

Encouraged contributions to social inclusion aims by maximising the take up of benefits available.

Contributed to the delivery and implementation of the Council's ICT strategy by developing new and innovative ways of expanding the Council's use of electronic services, capitalising on the potential of information technology

Increased the number of transactions performed electronically.

Expanded the provision of information to Fareham citizens, claimants, and other organisations.

Increased the operational and cost effectiveness of the service.

Developed ICT skills, aptitude and awareness of employees.

Supported the Council in recommendations following a CPA review

Implemented a process of benchmarking to measure the performance of the service against that provided by other local authorities.

Researched and developed local Performance Indicators and targets and regularly monitored and reported on the quality of service provision against

those indicators, achieving top quartile results

Monitored and reported on performance against National Performance Indicators and targets, achieving top quartile results

Consulted customer/clients in service developments and seeking their views on issues for improvement

Member of Departmental Management Team.

Kept the Director informed of progress and developments relating to performance, operation and management of the unit.

Supported the democratic process and elected members in the provision of Benefit services and to help the achievement of the Council's vision, aims and objectives.

Prepared reports and presented them to elected members.

Responded to requests for help and information from elected members

September 05 to January 06

Flintshire County Council

Consultancy Advice on IBS Workflow implementation

Advice and guidance on the implementation of IBS workflow.

Preparation of "to be" models based upon changed working practices

Advice on scanning and indexing requirements including document types etc.

Provision of implementation plan and acceptance testing.

January 2005

Stroud DC

Bid Preparation/Consultancy

Together with IBS, preparation and presenting of a DWP bid to improve and enhance the IBS workflow system, more than £400,000 funding achieved.

Reviewing with user's enhancement requests to determine priority and quick hits in improving performance.

February 2004 to September 2005

Oadby and Wigston BC

Consultancy advice on Pericles Implementation

Retained by Oadby and Wigston BC to provide system implementation and project management of the Pericles benefits product, leading to a go live date of April 05.

Acting as the Project Manager and implementer, working with corporate colleagues in devising interfaces, and implementation plans.

Devising a manual load and reconciliation procedures.

Chairing all project boards and providing risk analysis details to the Head of Service and Chief Executive.

January 2004 to April 2004

East Dorset District Council

Consultancy on Replacement Systems

Review of current systems and provision of a full report as to options for replacement systems.

Assistance with initial partnership working with Christchurch BC.

Preparation of DWP bid for procurement of new systems.

Jan 2004 to May 2004

Anite

Project Manager

Provided contracted support as the Anite project manager for the Anite Images@work system into the London Borough of Lambeth Housing and Forest of Dean Council Revenues and Benefits services.

Duties included, full project management, training, time management, BPR and system review. Full project board role.

Jan 2003 to April 2004

Stroud DC

Benefits Manager

Day to day management of a busy benefits section,

Responsibility for all types of claims,

Restructure of section and appointment of full time benefits manager

Implementation of IBS (OPEN) and beta implementation of IBS workflow.

Implemented new procedures for Tax Credits and benefit period abolition.

Jan 2002 to May 2003

Oadby and Wigston BC

Head of Revenues and Benefits (Jan 02 – April 02) followed by assistance in Council Tax Implementation of Pericles.

Participated in the Directorate Management Team and the Chief Executive's team meetings.

Developed and pursued a 'best value' approach to the delivery of the Revenues and Benefits Service, including the identification and maintenance of appropriate benchmarks and continuous improvement.

Led the Revenues and Benefits Management Team.

Ensured that adequate management and staff resources, together with efficient and secure systems are provided, in relation to:

- (i) The billing, collection and arrears recovery of Council Tax, National Non-Domestic Rates,
- (ii) The assessment, payment and recovery of overpayments of Housing and Council Tax Benefits;
- (iii) The Verification Benefits Framework and Benefit fraud investigation.
- (iv) The compilation of statutory returns together with the provision of timely information to Government departments and other bodies as required.

Interpreted legislation, and advise on implications to the Council.

Advised Revenues and Benefits staff on appropriate action in complex cases.

Prepared and presented reports to Management Team and to Council Committees,

Ensured budgets were correctly formulated, profiled, monitored, reviewed and controlled and any exception reports duly issued.

Investigated and responded to all complaints against the Revenues and Benefits Service, in accordance with the Council's complaints procedure.

Subsequent to holding the post of Head of Revenues and Benefits I assisted

in the implementation of Pericles Council Tax and the interfaces to benefits as required.

July 2000 to May 2002

London Borough of Hammersmith and Fulham

Consultancy and Project Management of Document Management Implementation

Initially assigned to reviewing an ongoing project for implementation of a document management system (Top Tech)

After Top Tech had gone into liquidation, duties involved:

Procuring a new system (Anite@work), including site reviews and chairing of the selection committee.

Maintaining regular updates to The Director of Housing a head of service as to progress against implementation plans.

Developing selection criteria, including a full specification.

Undertaking with corporate colleagues, the contractual arrangements and creating the formal contract

Project managing the implementation. Including training and devising roll out plans for over 100 staff

Creating and managing a system implementation team, including devising new procedures for document handling, scanning, indexing and archival of scanned documents

Working with IT in system implementation and devising of interfaces.

Creating and undertaking acceptance testing and sign off system.

Creating a hand over plan to full time employees of the authority.

Jan 1999 to May 2001

Comino (ISE) – Document Management Supplier

Consultancy

Professional consultancy/advice on systems implementation and workflow analysis for the following authorities

Warrington BC

Medway Council
Hull Council
Ashfield Council
Milton Keynes UA

August 2000 to October 2000

Public Sector Consultants

Consultancy

Professional consultancy and advice on subsidy for Taunton Deane Borough Council.

Advice and review of recovery procedures at London Borough of Brent

January 1999 to January 2000

ITNET

Interim Management

Initial consultancy role reviewing working practices within recently outsourced authorities

Interim Benefits Manager providing service improvement via improvement plan and performance management.

Client meetings and monitoring of performance against agreed objectives

Attendance at housing liaison and committee meetings

October 1998 to April 1999

East Dorset District Council

Interim Head of Revenues and Benefits

Management of a busy revenues and benefits section

Reporting directly to Chief Executive.

Implementation of the In-House won contract, setting up performance measurement and attending client meetings as required.

Interview and selection of full time Head of Revenues and Benefits

Liaison with Councillors and other corporate colleagues.

April 1997 to October 1998

Barony Consultancy

Management Consultant

Undertaking service and competitive reviews.

Benchmarking and cost analysis for outsourcing of services.

Training on Best Value.

Undertaking competitive bids for in-house contracts including writing method statements and tender documentation.

January 1984 to April 1997

Northavon District Council (South Gloucestershire Council on Reorganisation)

Head of Revenues and Benefits 1994 - 1997

Principal Revenues Officer 1990 - 1994

Benefits Manager 1984 - 1990

Various roles including Benefits Manager introducing changes in 1984, 1987, 1990 and 1993

Community Charge and Council Tax system implementations in 1990 and 1993.

Head of Revenues and Benefits with full budgetary control and responsibility for over 100 staff.

Sept 1980 to January 1984

Oadby and Wigston Borough Council

Revenues Manager 1982 -1984

Revenues Officer 1980 - 1982

Rating and Benefit duties.

Special responsibility for implementation of in house system (CMC Reality)

Responsible for new benefits system and partial start in 1982

May 1978 to September 1980

Newport Borough Council

Revenues Assistant

General rating and clerical duties.

Education

1980 - 1985

Full IRRV qualification – Prize awarded in management and administration

IT Skills

IT Literate

Microsoft Office

Microsoft Project/Access/VISIO/FrontPage

Querymaster

Northgate (Part)

Anite@work

IBS Open

IBS workflow

Anite HBIS/CTAX/BRATES

PERICLES (Revenues and Benefits)

Anite mobile working

Project management methodology and practical skills