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| SUBJECT: | REVENUES AND BENEFITS SHARED SERVICE BUSINESS PLAN 2022/23 |
| DIRECTORATE: | CHIEF EXECUTIVE |
| REPORT AUTHOR: | MARTIN WALMSLEY, HEAD OF SHARED REVENUES AND BENEFITS |

1. Purpose of Report

- 1.1 As set out in the Shared Revenues and Benefits Business Case Delegation and Joint Committee Agreement, an annual Business Plan will be presented to this committee in November/December each year for consideration and approval.

2. Executive Summary

- 2.1 This report sets out the Revenues and Benefits Shared Service Business Plan for 2022/23.

3. Business Plan

- 3.1 The Revenues and Benefits Shared Service Business Plan for the financial year 2022/23 is included as Appendix 1 to this report.

- 3.2 Key features of the plan, are:

- Key Achievements in 2021/22;
- Savings in 2021/22;
- Key Activities for 2022/23;
- Strategic Priority schemes 2022/23;
- Towards Financial Sustainability projects 2022/23
- Key Risks;
- Performance Management;
- Safeguarding;
- Equality actions;
- Working in Neighbourhoods;
- Workforce Development;
- Social Value;
- Data Protection and Information Governance.

4. Summary of Plan

- 4.1 The year 2021/22 has been another positive year for the Revenues and Benefits Shared Service, albeit very challenging with a whole host of Covid-19 recovery related-initiatives. The impacts of Covid-19 have been substantial and cannot be underestimated. The financial impacts on taxpayers and businesses have been substantial, which has understandably impacted on revenues collection. The service continues to promote the 'Get in touch, not in debt' message – with very much a focus on 'welfare' when making payment arrangements with customers.

Also, the increase in the Benefits workload as more people sadly find themselves out of work has provided another challenge which the service has responded to positively.

- 4.2 The impacts of Covid-19, like in many other service areas, have been significant and are likely to continue for some considerable time going forward – with increased contact from taxpayers and businesses struggling to pay their bills, as well as increased levels of benefit claims and associated support.

A number of additional demands have been placed on our Revenues and Benefits Service over the last eighteen months, including;

- Test and Trace Support Payments;
- Support for Business Grants;
- Winter Grant Scheme payments;
- Council Tax Hardship Fund;
- Business Rates Reliefs;
- Increase in Benefits claims/changes;
- Universal Credit changes.

These additional demands should not be underestimated and understandably impact on levels of performance in some areas.

However, despite these major challenges, performance in most areas remains positive – officers are wholly committed to achieving the best possible standards of service to our customers.

- 4.3 Officers have settled in well to the new way work of working – the hybrid/blended approach of 40% office/ 60% homeworking, - which is meeting front-facing customer demands, whilst gaining advantages of homeworking through efficiencies and increased productivity in some areas. A ‘one team’ and customer-focussed culture has also been maintained through this new way of working, as colleagues do get to see each other in person again through office presence – and as well as through regular communication through MS Teams.
- 4.4 Ongoing budget pressures including combined reductions in funding through Department for Work and Pensions (DWP) and Ministry of Housing, Communities and Local Government (MHCLG) means that the service has had to continue adapting the shared service budget accordingly, allocating resources to areas of higher customer demand, and operating vacancy management extremely carefully.
- 4.5 The plan for 2022/23 continues to look at a range of key initiatives, with new workstyles, e-services, financial inclusion/welfare reform initiatives and standards of performance being crucial areas for the new financial year.
- 4.6 The shared service has further increased its focus on seeking partnership working opportunities and new areas of work which fit within the service’s wider remit, as well as successfully maintaining current arrangements and taking on new shared projects where these opportunities arise.
- 4.7 It continues to be extremely challenging times for local government in general, not least of which being in respect of Revenues and Benefits – due to the nature of the

service whereby each household and business in the districts is impacted in some way by the services we provided – and a range of new areas of work demands being placed on the service (examples highlighted in paragraph 4.2).

- 4.8 It remains the case that our shared service is not seen as a ‘transactional service’, but a key strategic and customer-focussed service that has tangible and real impacts on people’s lives. Our service aims to achieve positive impacts for residents of Lincoln and North Kesteven wherever possible, aiming to help people become financially and digitally included and helping those who can do find employment. Our shared service is extremely well placed to tackle the challenges, and positive opportunities, ahead.

5. Strategic Priorities

- 5.1 Both City of Lincoln and North Kesteven have a number of strategic priorities. Two that have an impact on the Revenues and Benefits Service are:-
- Lincoln: “Let’s Reduce all kinds of Inequality”.
 - North Kesteven: “Our Communities”.
- 5.2 The Benefits Service plays a key role in reducing inequality by ensuring residents receive the benefits they are entitled to and providing money / debt advice. The Revenues Section is also mindful of the strategic priorities when engaging with business ratepayers as they recover business rates – and also promoting and encouraging growth in the districts. Digital Inclusion, Channel Shift/ Customer Experience, Financial Inclusion and Partnership Working are all key priorities for the shared service.

6. Organisational Impacts

- 6.1 Finance: Any costs/savings need to have due regard to the Medium Term Financial Strategies of both City of Lincoln and North Kesteven. As at the timing of writing this report details of central government funding for 2022/23 is unavailable (e.g. Housing Benefits Administration Subsidy).
- 6.2 Legal Implications including Procurement Rules: There are no direct Legal or Procurement implications arising from this report.
- 6.3 Equality, Diversity & Human Rights: There are no direct implications arising from this report.

7. Risk Implications

- 7.1 A Risk Register is in place for the Revenues and Benefits shared service, and is included at Appendix 2 to this report.

8. Recommendation

- 8.1 The Joint Committee is recommended to:
- 1) Comment on the Annual Business Plan for the shared service, and
 - 2) Approve the 2022/23 Business Plan.

Is this a key decision? ~~Yes/No~~

Do the exempt information categories apply? ~~Yes/No~~

Does Rule 15 of the Scrutiny Procedure Rules (call-in and urgency) apply? ~~Yes/No~~

How many appendices does the report contain? Appendix 1 – Business Plan 2022/23
Appendix 2 – Risk Register
Appendix 3 – Business Plan 2022/23 (shortened version)

List of Background Papers: None

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