

SUBJECT: REVENUES AND BENEFITS SHARED SERVICE BUSINESS PLAN 2023/24

DIRECTORATE: CHIEF EXECUTIVE AND TOWN CLERK

REPORT AUTHOR: MARTIN WALMSLEY, ASSISTANT DIRECTOR – 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 2023/24.

3. Business Plan

- 3.1 The Revenues and Benefits Shared Service Business Plan for the financial year 2023/24 is included as Appendix 1 to this report.

- 3.2 Key features of the plan, are:

- Key Achievements in 2022/23;
- Savings in 2022/23;
- Key Activities for 2023/24;
- Strategic Priority Schemes 2023/24;
- Towards Financial Sustainability projects 2023/24
- Key Risks;
- Performance Management;
- Safeguarding;
- Equality Actions;
- Working in Neighbourhoods;
- Workforce Development;
- Social Value;
- Data Protection and Information Governance;
- Corporate Social Responsibility.

4. Summary of Plan

- 4.1 The year 2022/23 has been another positive year for the Revenues and Benefits Shared Service, albeit very challenging with a whole host of Covid-19 recovery and Cost of living support related-initiatives. The impacts of Covid-19 have been

significant and cannot be underestimated, as are the ongoing impacts of rising cost of living challenges. 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 cost of living challenges really start to impact.

- 4.2 The impacts of Covid-19 and cost of living, 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 twelve months, including;

- Household Support Fund;
- Council Tax Energy Rebate;
- Council Tax Hardship Fund;
- Business Rates Reliefs – including Covid Additional Relief Fund (CARF);
- 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 To give an indication of key outcomes, above the 'standard' Key Performance Measures reported, the following figures demonstrate what the shared service has awarded over the last 2-3 years:

- ✓ **Test and Trace Support Payments totalling more than £1.5 million;**
- ✓ **Household Support Fund Payments totalling more than £1.3 million;**
- ✓ **Covid Additional Relief Fund of almost £3.9 million;**
- ✓ **Expanded Retail Discount of almost £61 million;**
- ✓ **Discretionary Housing Payments of £476,000 (1st April 2021 – 30th September 2022);**
- ✓ **Council Tax Energy Rebates totalling almost £15.3 million.**

- 4.4 Officers have settled in well to the hybrid working model, with the 'standard' in the Revenues and Benefits Shared Service being 40% office/ 60% homeworking. This approach 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, as

colleagues do get to see each other in person again through office presence and meetings – as well as through regular communication through Microsoft Teams.

- 4.5 Ongoing budget pressures including combined reductions in funding through Department for Work and Pensions (DWP) and Department for Levelling Up, Housing and Communities (DLUHC) 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.
- 4.6 The plan for 2023/24 continues to look at a range of key initiatives relating to areas including e-services, financial inclusion and cost of living, as well as standards of performance.
- 4.7 The shared service will continue to 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.
- 4.8 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 provide – and a range of new areas of work demands being placed on the service (examples highlighted in paragraph 4.2).
- 4.9 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 – with rising cost of living pressures, this is more vital than ever. Our service aims to achieve positive impacts for residents and businesses of Lincoln, North Kesteven and West Lindsey 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. Three that have an impact on the Revenues and Benefits Service are:-
 - Lincoln: "Let's Reduce all kinds of Inequality."
 - North Kesteven: "Our Communities," "Our Economy."
- 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 2023/24 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 2023/24 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 2023/24
Appendix 2 – Risk Register

List of Background Papers: None

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