

SUBJECT:	REVENUES AND BENEFITS SHARED SERVICE BUSINESS PLAN 2024/25
DIRECTORATE:	CHIEF EXECUTIVE AND TOWN CLERK
REPORT AUTHOR:	MARTIN WALMSLEY, ASSISTANT DIRECTOR – SHARED REVENUES AND BENEFITS

- 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 each year for consideration and approval.

2. Executive Summary

- 2.1 This report sets out the Revenues and Benefits Shared Service Business Plan for 2024/25.

3. Business Plan

- 3.1 The Revenues and Benefits Shared Service Business Plan for the financial year 2024/25 is included as Appendix 1 to this report.

- 3.2 Key features of the plan are:

- Key Achievements in 2023/24;
- Savings in 2023/24;
- Key Activities for 2024/25;
- Strategic Priority schemes 2024/25;
- Towards Financial Sustainability projects 2024/25
- 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 2023/24 has been another positive year for the Revenues and Benefits Shared Service, albeit very challenging with a whole host of post Covid-19 pandemic and Cost of living support related-initiatives. The impacts from 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 – particularly in relation to Council Tax. The service continues to promote the ‘Get in touch, not in debt’ message – with a real focus on ‘welfare’ and income-maximisation for customers when making payment arrangements. Also, the increase in the overall Benefits workload as cost of living challenges continue to significantly impact, means that staffing resources and priorities need to be regularly ‘juggled.’

- 4.2 Further to the above, 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 Support Fund;
- Business Rates Reliefs;
- Increase in Benefits claims/changes / Universal Credit changes;
- Alternative Energy support funds
- Storm Babet flood support
- Pressures and impacts from temporary accommodation, and reduced Discretionary Housing Payments funding.

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 examples of what the shared service has awarded:

- ✓ **Household Support Fund Payments totalling almost £1million delivered in 2022/23, £342,016 allocated to local schemes in 2023/24 + additional funding for Housing Benefit Cost of Living payments;**
- ✓ **Retail, Hospitality and Leisure Relief (for businesses) of almost £7.7million;**
- ✓ **Discretionary Housing Payments of £232,680 delivered in 2022/23, on target to deliver an equivalent amount in 2023/24;**
- ✓ **Alternative Energy support funds totalling £354,800 paid out in 2023.**

- 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. The Revenues and Benefits Management Team (RBMT) continually review and implement changes to further improve the 'one team' culture.

- 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, operating vacancy management extremely carefully, and 'flexing' job roles to take on additional initiatives.
- 4.6 The plan for 2024/25 continues to look at a range of key initiatives relating to areas including e-services, 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 appropriate 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). The profile of this service has certainly been further elevated over the last 3½ years (from the Covid-19 pandemic) and there is every reason to believe the shared service's remit will become even more prominent with new initiatives over the next few years.
- 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 continuing 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. Cost of living has also focused on key 'basic' requirements of life for residents – i.e. food, fuel and clothing – and initiatives have been developed and continue to be developed. 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.

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 2024/25 Business Plan.

Is this a key decision?	No
Do the exempt information categories apply?	No
Does Rule 15 of the Scrutiny Procedure Rules (call-in and urgency) apply?	No
How many appendices does the report contain?	Appendix 1 – Business Plan 2024/25 Appendix 2 – Risk Register
List of Background Papers:	None
Lead Officer:	Martin Walmsley, Assistant Director – Shared Revenues and Benefits Martin.walmsley@lincoln.gov.uk