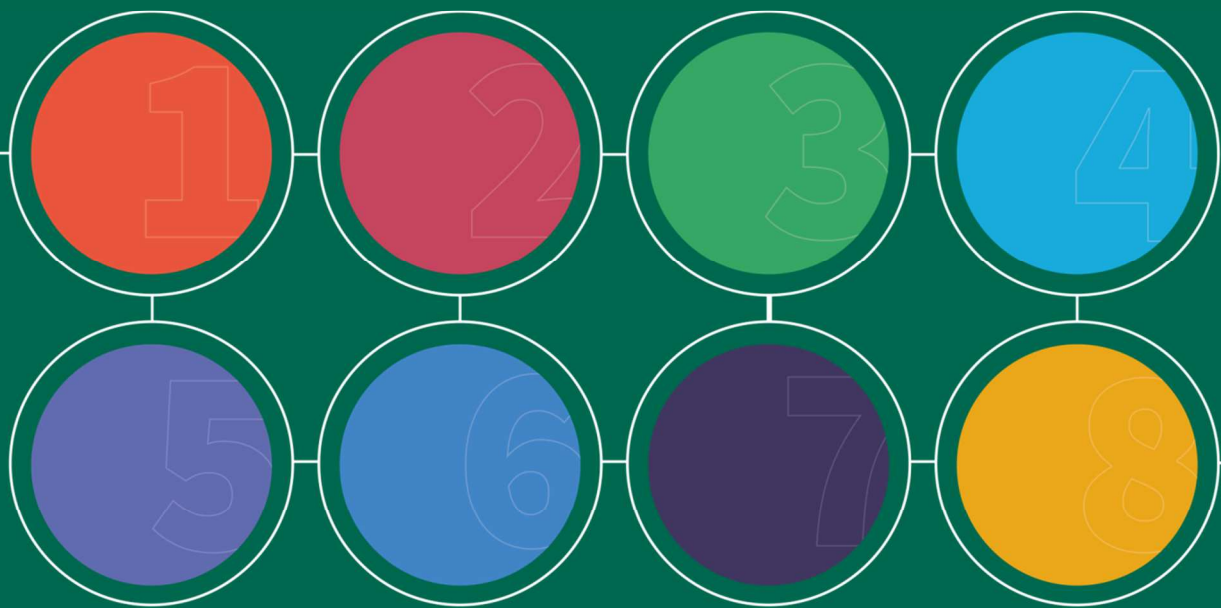


# Finance and Property Services Management Plan 2020/21



# An introduction to the Management Plan from the Head of Finance and Property Services

The Management Plan is a key planning document that explains how the service will support the delivery of the council's eight priorities in 2020/21

West Lothian Council is one of the top performing local authorities in Scotland, with a strong track record of delivering better outcomes for local people. The council aims to continue to support growth in the thriving local community and, with financial and demographic challenges ahead, will require an effective Finance and Property Services team to support transformation.

In Finance and Property Services we provide a wide range of services to customers and to all areas of the council. Each is designed to efficiently contribute to positive outcomes in the eight corporate priorities (see below) through effective models of support, planning, policy and advice in relation to: Anti-Poverty Service, Audit, Risk and Counter Fraud, Construction Services, Financial Management, Property Management and Development, and Revenues.

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**Corporate Priorities 2018/23** | The council re-committed to eight ambitious priorities following a large public consultation in 2017/18. We believe these priorities will continue to support improvement in the quality of life for everyone living, working and learning in West Lothian and will be the focus for council services, resources and staff in the next three years.



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In support of the Corporate Plan 2018/23 and the eight priorities we will continue to strive to improve the quality and value of council services.

As well as assuring effective governance and compliance, Finance and Property Services will maintain a clear focus on delivering Best Value, whilst empowering residents and stakeholders to have their say on how council services develop and transform.

This management plan fulfils a number of planning and improvement requirements and importantly, it sets out how the service will use its resources to deliver positive outcomes for West

Lothian. It is the result of a detailed process to make sure that council services are well planned and managed.

I hope that it will help our customers, employees and partners to understand how we will transform our services and continue to deliver for West Lothian.



**Donald Forrest**  
Head of Finance and Property Services

## Our services

The services that we will deliver through collaboration with our partners in 2020/21

Finance and Property Services provides positive leadership so that the council, along with our Community Planning Partners, continues to modernise and provide high quality services, fulfil the needs of communities, and secure targeted outcomes. In the next three years the service will continue to deliver value adding activities and will assist in the implementation of the council's transformation programme through:

- ◆ Advice and support on financial management processes
- ◆ Advice, assistance and support to empower communities
- ◆ Effective management of council properties whilst increasing energy efficiency and renewable energy
- ◆ Redesign of business processes to support more efficient service delivery and an integrated approach
- ◆ Providing professional support to services in the implementation of strategies, plans, programmes and projects
- ◆ The modernisation of property assets
- ◆ Delivery of revenue and capital strategies
- ◆ Effective treasury management

**The key activities of the service are identified in the Management Plan with the following unit service teams:**

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## Supporting the delivery of Council priorities

The service will support the delivery of the Council's Corporate Plan priorities and strategies

The service will make a meaningful and measurable contribution to the delivery of the Council's Corporate Plan 2018/23. As well as continuing to play a core role in the Revenue Budget, Capital Budget, Asset Management, Anti-Poverty and Audit, Risk and Counter Fraud strategies, the service's key processes are aligned to the Corporate Plan priorities/enablers and deliverables in the following table.

Alignment with Corporate Priorities / Enablers					
Council priority / enabler	Deliverable	Finance and Property Services key activity / process	Indicator(s)	2019/20 Performance	2020/21 Target
3 Minimising poverty, the cycle of deprivation and promoting equality	(P3.1) Agreeing a comprehensive Anti-Poverty Strategy for 2018 to 2023 and annual action plans, along with Community Planning Partners that will maximise the impact that can be achieved locally in positively addressing the causes of poverty and in mitigating the impact of poverty.	◆ Create an anti-poverty task force which will include local councillors who will provide a strategic overview.	Anti-Poverty Task Force is convened and meets four times per year	Meetings held as per timetable	Task Force meeting regularly and reporting to CPP Board Integrating new reporting requirements into remit
		◆ Create an anti-poverty practitioners network to support the delivery of the annual action plan.	Network meeting bi-monthly.		
		◆ Develop and publish a Local Child Poverty Action Plan annually in partnership with NHS Lothian.	Publish plan annually.		
		◆ Develop and integrate food poverty activity into annual action plan.	SOA1301_Percentage of children in poverty in West Lothian		
3 Minimising poverty, the cycle of deprivation and promoting equality	(P3.2) Engaging on an ongoing basis with people experiencing poverty in West Lothian and using the council's platform to raise these experiences with the Scottish and UK governments and other stakeholders.	◆ Create an Experts Through Experience panel consisting of a cross-section of West Lothian residents who have recent, lived experience of being poor.	Number of Experts Through Experience recruited, trained and utilised.	Experts Through Experience Panel created	Panel members meeting on a bi-monthly basis Develop a virtual focus group to gain a wider range of views
◆ Work with the Panel on a regular basis to seek their views on activity and proposed projects to alleviate poverty.	Bi-monthly meetings with practitioners network delivered				
◆ Through the proposed Anti-Poverty Practitioners network, canvas and seek information and evidence.					

Alignment with Corporate Priorities / Enablers					
Council priority / enabler	Deliverable	Finance and Property Services key activity / process	Indicator(s)	2019/20 Performance	2020/21 Target
3 Minimising poverty, the cycle of deprivation and promoting equality	(P3.3) Process claims for Housing Benefit and Council Tax Reduction promptly for those on benefits and/or low incomes, mitigating the impact of the introduction of Universal Credit Full Service as much as possible through effective planning and review of processes. Ensure funds available for the Scottish Welfare Fund and Discretionary Housing Payments are utilised in full to support our most vulnerable citizens.	◆ Administration of Housing Benefit and Council Tax Reduction, including appeals and interventions. Administration of Scottish Welfare Fund and Discretionary Housing Payments.	APS078_Number of days to process new Housing Benefit claims	15 days	15 days
			APS068_Number of days to process new Council Tax reduction claims	15 days	15 days
			APS072_Scottish Welfare Fund spend against budget	100%	100%
			APS054_Discretionary Housing Payment spend against budget	100%	100%
Financial planning	(E1.1) Delivery of the three year revenue plan for 2020/21 to 2022/23 that will enable the council to deliver the Corporate Plan.	◆ Preparing three year revenue budget for 2020/21 to 2022/23.	FM003_Three Year Revenue Budget Approval Within Set Deadlines	100%	100%
			◆ Joint working approach with Transformation Team to review and monitor delivery of 2020/21 savings and overall three year plan.	FM091_Budget Strategy and Planning Compliance With Timescales for Reporting	100%

<b>Alignment with Corporate Priorities / Enablers</b>					
Council priority / enabler	Deliverable	Finance and Property Services key activity / process	Indicator(s)	2019/20 Performance	2020/21 Target
Financial planning	(E1.2) Monitoring progress towards delivery of the 2020/21 budget and the overall three year revenue budget for the period 2020/21 to 2022/23.	<ul style="list-style-type: none"> <li>◆ Regular financial monitoring of the delivery of the 2020/21 revenue budget and approved savings.</li> <li>◆ Regular monitoring of 2020/21 budget risk areas and action being taken to manage pressures.</li> <li>◆ Co-ordinating the financial monitoring of progress towards delivery of budget savings for 2020/21 and 2022/23.</li> <li>◆ Close working in partnership with Heads of Service, Corporate Transformation Team and HR.</li> </ul>	FM014_ Budget Monitoring – Compliance with Timescales for Formal Reporting	100%	100%
Financial planning	(E1.3) Monitoring delivery of 2020/21 capital budget and the overall long term capital plan to 2027/28 within available resources	<ul style="list-style-type: none"> <li>◆ Co-ordinating the financial monitoring of the 2020/21 capital budget and overall programme within available resources.</li> <li>◆ Ongoing development of the capital plan assumptions over the period to 2027/28 taking account of funding and expenditure updates.</li> </ul>	FM002_Annual General Services Capital Programme Budget approved within set timescales  FM014 Budget monitoring – Compliance with Timescales for Formal Reporting	100%	100%

Alignment with Corporate Priorities / Enablers					
Council priority / enabler	Deliverable	Finance and Property Services key activity / process	Indicator(s)	2019/20 Performance	2020/21 Target
Financial planning	(E1.4) Developing a corporate asset management strategy that supports effective management of assets.	<ul style="list-style-type: none"> <li>◆ Delivery of asset management strategy through capital programme delivery.</li>   <li>◆ Property Management &amp; Development (PM&amp;D) act as lead for the Council's Corporate Asset Management Strategy (CAMS) that encompasses Property, Roads, Open Space, Information and Communication Technologies (ICT), Fleet and Housing.</li> </ul>	<p>FM091_Budget Strategy and Planning – Compliance within Timescales for Formal Reporting</p> <p>Corporate Asset Management Strategy (CAMS) agreed by Council with actions defined by officers. CAMS establishes corporate priorities for all asset categories, these are:</p> <ul style="list-style-type: none"> <li>◆ Compliance</li> <li>◆ Condition</li> <li>◆ Suitability</li> <li>◆ Sufficiency</li> <li>◆ Accessibility</li> <li>◆ Sustainability</li> </ul>	100%	100%
Corporate Governance and Risk	(E2.4) Taking informed and transparent decisions which are subject to effective scrutiny and managing risk.	<ul style="list-style-type: none"> <li>◆ To enable the council to effectively manage risk, reducing its cost and impact, and ensure the delivery of essential services.</li> </ul>	P:IA021_Percentage of risks subject to annual documented risk assessment in Pentana	100%	100%



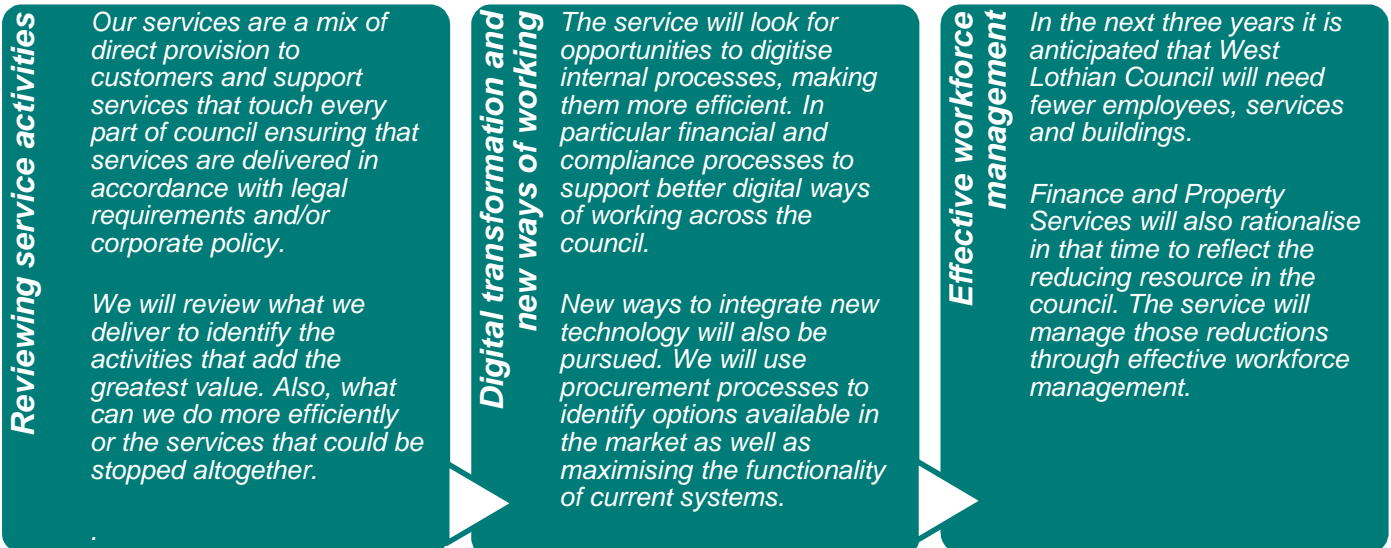
## Transforming Your Council

How Finance and Property Services will continue to transform over the period 2018/19 to 2022/23

The council is progressing an ambitious programme of transformation in order to support the delivery of services that are accessible, digital and efficient. The Transforming Your Council programme is intended to deliver over £31 million in savings over the period 2020/21 to 2022/23 and will fundamentally change the way that council services are delivered

As a service that supports every part of the organisation and some of our key partners, it is critical that Finance and Property Services is at the forefront of change in the council. We must ensure that, as well as supporting services to transform, that we identify more efficient models of support. Projects designed to deliver budget savings of £2.038 million have been approved to transform the way that we work in Finance and Property Services.

**Transformation in the service will be grouped around three key themes.**



### Engagement methods

Throughout the period of this plan, Finance and Property Services will continue to engage and consult with customers, employees, trade unions, partners and stakeholders on the effectiveness of the services that we provide and also about any changes that are proposed to the offering. Details of planned engagement and consultation methods will be provided in the Finance and Property Services annual update to the Management Plan.

Finance and Property Services make the following commitments to customers, employees and partners:

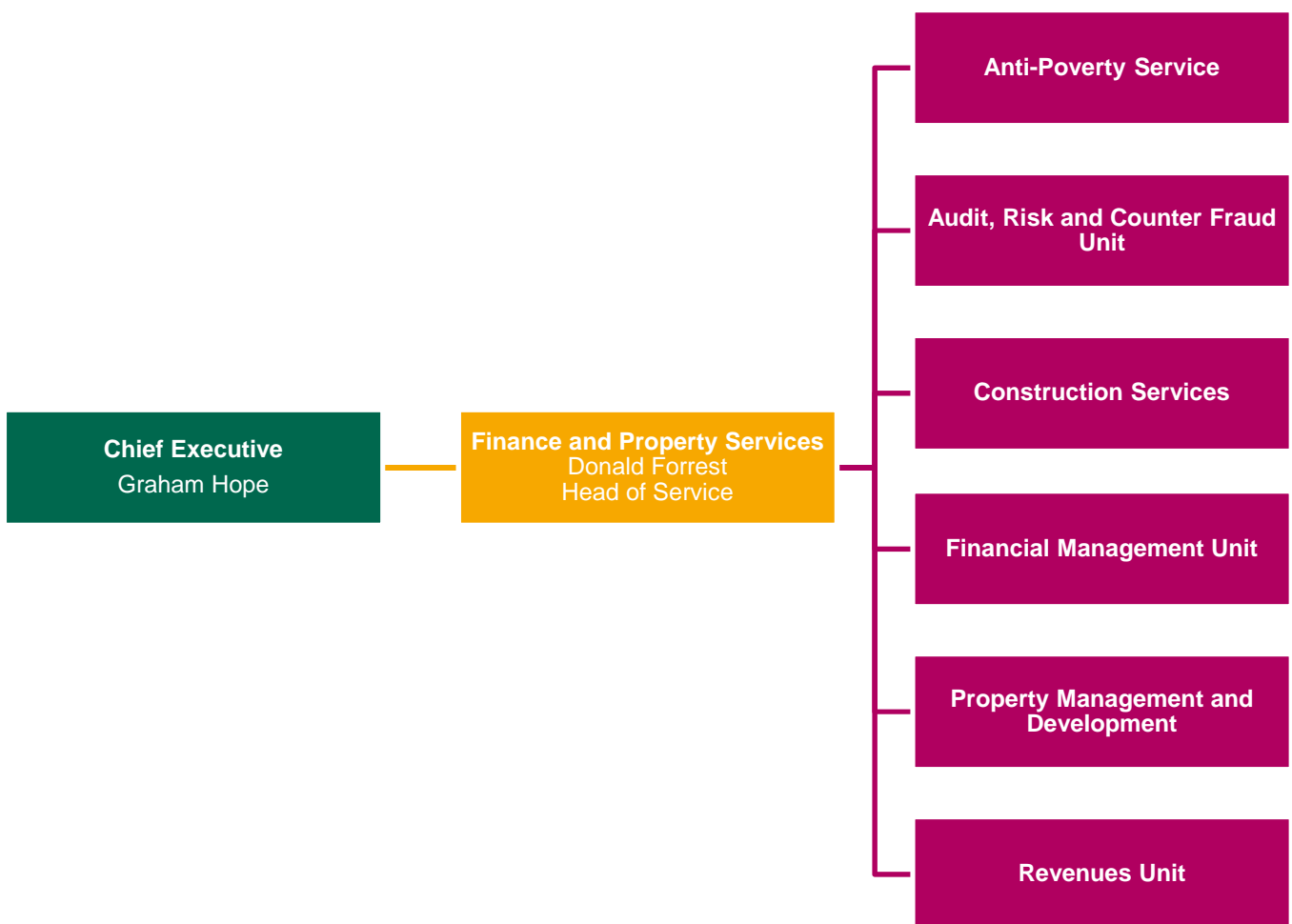
- ◆ We will involve and engage employees, customers and partners in service improvement and transformation activity through a range of appropriate methods.
- ◆ We will ask customers about the quality and effectiveness of the services that we provide through regular consultation and surveys using their views to inform decision making in the service.



## Service Activity

Finance and Property Services is focused on the delivery of key services that support effective governance, financial planning and asset management in the council.

Finance and Property Services is responsible for effective planning and management of financial resources in the council, income collection and the management and disposal of council assets. This includes two large frontline customer services that support collection of income for the council and provide anti-poverty and welfare advice services.



Finance and Property Services comprises of six service areas – known as West Lothian Assessment Model (WLAM) units, under the direction of the Head of Finance and Property Services.

The following section provides more information on the activities and resources of each WLAM unit.

## Employee Engagement

Finance and Property Services has a total of 236.8 FTE (full time equivalent) employees delivering our services.

Motivation and commitment are key drivers of employee performance and the service aims to effectively engage and develop employees through improved communication and increased participation. The service uses the council's employee engagement framework, to ensure that employees have access to the information and support they need to succeed, and that there is constructive, regular two-way communication throughout the service.

The schedule of engagement that will take place in each of our WLAM units is outlined in the table below.

<b>Employee Engagement Schedule</b>			
<b>Employee Group</b>	<b>Method</b>	<b>Frequency</b>	<b>Responsible Officer</b>
<b>All employees</b>	Email	Monthly	Service Manager
<b>All employees</b>	One-to-ones	Fortnightly / monthly/quarterly	Service Manager and Service Management Team
<b>All employees</b>	Team meetings	Monthly	Service Manager and Service Management Team
<b>All employees</b>	Team briefings	Quarterly	Service Manager and Service Management Team
<b>All employees</b>	Employee survey	Every two years	Service Manager
<b>All employees</b>	Appraisal and Development Review (ADR)	Annually	Service Manager and Service Management Team
<b>Employee sample</b>	Employee focus group	Annually	Service Manager
<b>All employees</b>	Management Plan Launch	Annually	Head of Service / Service Managers
<b>All employees</b>	Circulation of the Finance and Property CMT update report	Monthly	Service Manager
<b>Service Management Team</b>	Extended Management Team	Six monthly	Head of Service
<b>Service Managers</b>	Service Management Team	Fortnightly	Head of Service
<b>All volunteers</b>	Survey/focus groups	Annually/six monthly	Service Manager



## Risk Management

Risk can be defined as the effect of uncertainty on an organisation's objectives.

The council aims to mitigate risks to its objectives by implementing robust risk management procedures which enable managers to effectively manage their risks.

Significant risks to Finance and Property Services' objectives are set out in the council's corporate risk register. These risks are regularly monitored by managers and are reviewed on a monthly basis by the service management team to ensure that appropriate and effective control measures are in place.

Finance and Property Services is currently managing the following risks considered to be high:

Service Risks 2020/21			
Risk Title	Risk Description	Current Risk Score	Traffic Light Icon
WLC026 Failure to effectively manage the impact on council objectives of exit from the European Union	Exit from the European Union resulting in an economic downturn or recession impacting on the overall grant settlement, and causing an increased demand for welfare advice, additional Scottish Welfare Fund claims, additional housing benefit claims and increased processing times, reduced commercial rent income from tenanted non- residential portfolio, and lower council tax collection rates. EU nationals may decide to return home, and there may also be short term disruption to the supply of goods to the council, both of which would have an adverse impact on council services. It is expected that the impact of EU exit would be particularly severe in the event of a "no deal" scenario.	16	
WLC023 Failure to deliver financial plan 2018/19 to 2022/23	Adverse financial settlement resulting in changes to funding, or unanticipated cost pressures, could lead to failure to deliver the agreed West Lothian Council medium term financial plan, resulting in unplanned service reductions, a failure to deliver key services, reputational damage, and industrial action.	12	

## Anti-Poverty Service

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**Service manager:** Elaine Nisbet

**Number of staff:** 66.9 (full time equivalents)

**Locations:** Bathgate Partnership Centre, St David's House and various locations throughout West Lothian

### Purpose

The Anti-Poverty Service provides a range of services, many of which support the most vulnerable households in West Lothian. The service contributes to the Council's Corporate Plan priority "Minimising poverty, the cycle of deprivation and promoting equality" by providing comprehensive advice, support and assistance to people in West Lothian who:

- ◆ Are without work or in low paid work
- ◆ Are poor and / or fuel poor
- ◆ Have money / debt issues
- ◆ Have been affected by cancer or other long term conditions
- ◆ Are in crisis
- ◆ Are in receipt of benefits and /or have an entitlement to payments managed by the service
- ◆ Are being assessed for social care services

The service aims to help these groups increase their disposable income, manage their debt, improve their budgeting skills, remain in their home, and, where appropriate, appeal decisions made by the Department of Work and Pensions. The service also utilises the skills and knowledge of volunteers who play a valuable role in supporting customers to access services and provide a listening ear which can offer a network of support and information.

The service is responsible for the administration of Housing Benefit, the Council Tax reduction scheme and the Scottish Welfare Fund. It also has the responsibility of administering and improving the uptake of free school meals, school clothing grant, education maintenance allowance and blue badges. It provides a front line service to recipients of benefits, which includes processing claims, assessing benefits, processing discretionary housing payments as well as other payments to claimants. The service is also responsible for undertaking financial assessments as part of the non-residential contributions policy

All activity across the service is informed and prioritised by the Community Planning Partnership Anti-Poverty Strategy 2018/23. The overall purpose of this strategy is to reduce inequalities, tackle the causes of inequality to ensure that people are not financially excluded, and to minimise the impact of poverty on the people of West Lothian.

### Activities

The main activities of the service during the period of the Management Plan are:

- ◆ Delivering an anti-poverty action plan in partnership with the Anti-Poverty Practitioners' Network which targets early interventions and contributes to the outcomes of the community planning partnership's anti-poverty strategy.
- ◆ Publishing an annual Local Child Poverty Action Plan Report in partnership with NHS Lothian.
- ◆ Working in partnership to introduce the Improving the Cancer Journey project across the Lothians.

- ◆ Working with the community planning partners and the Scottish Government to develop a food poverty action plan and local food network.
- ◆ Extending the qualification criteria for School Clothing Grants with a view to automation of awards and providing a customer focused service for parent/pupil benefit applications for free school meals and Education Maintenance Allowance.
- ◆ Develop and embed a new software system to aid the administration of the financial assessment and income health checks for those adults being assessed for social care.
- ◆ Planning for ongoing welfare reforms and changes including the introduction of the Scottish Social Security system.
- ◆ Delivering an advice service which provides income maximisation support, money, debt, fuel and housing advice.
- ◆ Delivering Housing Benefit, Council Tax Reduction, Scottish Welfare Fund and Discretionary Housing Payments administration.
- ◆ Working with services to offer a range of volunteering opportunities to enhance delivery and better support customers.

## **Key Partners**

The service actively works with our partners to plan, design and deliver improved services for our customers.

Our key partners include; Macmillan Cancer Support as an external funder, Scottish Legal Aid Board as an external funder, European Social Fund projects as a co-provider, West Lothian Anti-Poverty Strategy Task Force and Practitioners Group, West Lothian Advice Network, Department for Work and Pensions, Local Credit Unions: Blackburn, Seafield and District Credit Union and West Lothian Credit Union, Conduit Scotland, Voluntary Sector Gateway West Lothian and Citizens Advice Bureau West Lothian, NHS St Johns, HMP Addiewell, Carers of West Lothian, Registered Social Landlords (RSL), Scottish Government (Education Maintenance Allowance), Transport Scotland and other council services.

## Customer Participation

The service will actively engage customers and potential customers in the delivery and re-design of services to ensure that they are accessible and focused on their needs and preferences.

<b>Customer Consultation Schedule 2020/21</b>				
<b>Customer Group</b>	<b>Method</b>	<b>Frequency</b>	<b>Responsible Officer</b>	<b>Feedback Method</b>
<b>Anti-Poverty Service customers</b>	Satisfaction survey of 30 customers per week (paper based and electronic surveys)	Weekly	Income Maximisation Manager	Performance indicators
<b>Experts Through Experience</b>	Focus groups on key issues related to the Anti-Poverty Strategy	Regularly	Financial Inclusion Manager	Website/task force meetings
<b>Households in receipt of Housing Benefit/Council Tax Reduction</b>	Paper-based and electronic surveys	Regularly	Financial Support Manager	Performance Indicator
<b>RSL/private landlords</b>	Paper-based and electronic surveys	Annually	Benefit Assessment & Development Manager	RSL & Private Landlord Forums Performance Indicators
<b>Scottish Welfare Fund</b>	Electronic	Regularly	Financial Support Manager	Performance Indicators
<b>Parents in receipt of Education Maintenance Allowance</b>	Survey relating to services provided	Annually	Financial Support Manager	Public performance reporting
<b>Parents in receipt of free school meals</b>	Survey relating to services provided	Annually	Financial Support Manager	Public performance reporting
<b>Blue Badges</b>	Electronic survey	Regularly	Benefit Assessment & Development Manager	Management Team Meetings
<b>Non residential Contributions customers</b>	Electronic survey	Regularly	Benefit Assessment & Development Manager	Performance Indicator
<b>Volunteers</b>	Electronic survey/Focus Group	Annually	Financial Inclusion manager	Management team Meetings

**Activity Budget 2020/21**

<b>Anti-Poverty Service – Activity Budget 2020/21</b>								
Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £
<b>Income maximisation</b>	Promote social inclusion by maximising income and improving the standard of living of individuals, families and households who are living in poverty.	3 Minimising poverty, the cycle of deprivation and promoting equality	APS055 Unit cost of Advice Shop customer enquiries – Target £32	Public	21.1	1,037,666	(384,637)	653,029
			APS060 Total quarterly amount the Anti-Poverty Service has gained for its customers Target £6.75 million per quarter	Public				
<b>Energy advice</b>	Promote social inclusion by reducing fuel poverty	3 Minimising poverty, the cycle of deprivation and promoting equality	APS055 Unit cost of Advice Shop customer enquiries -Target £32	Public	4.8	226,510	(90,502)	136,008
			APS064 Total value of energy advice savings - Target £350,000 per annum (Q1 £100,000, Q2 £75,000, Q3 £75,000, Q4 £100,000)	High Level				
<b>Money and housing advice</b>	Promote social inclusion by maximising income and improving the standard of living of individuals, families and households who are living in poverty, and prevent homelessness in West Lothian.	3 Minimising poverty, the cycle of deprivation and promoting equality	APS055 Unit cost of Advice Shop customer enquiries - Target £32	Public	8.4	396,392	(158,379)	238,013

**Anti-Poverty Service – Activity Budget 2020/21**

Activity Name and Description	Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £	
		APS061 Anti-Poverty Service Money Advice - Customer debt managed through money advice intervention - Target £2 million per quarter	High Level					
		APS063 Housing advice - number of evictions prevented - Target 80 per quarter	High Level					
		APS072 Percentage of spend against available budget - Target 100%.	WLAM					
<b>Housing Benefit and Council Tax Reduction</b>	Administration of Housing Benefit and Council Tax Reduction including appeals, interventions and administration of Discretionary Housing Payments.	3 Minimising poverty, the cycle of deprivation and promoting equality	APS052 - Gross administration cost per Housing Benefit case - Target £24.00	WLAM	17.0	3,411,348	(649,557)	2,761,791
		APS078 - Average number of days to process new housing benefit claims - Target 15 days.	Public					



**Anti-Poverty Service – Activity Budget 2020/21**

Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £
<b>Scottish Welfare Fund</b>	Administration of Community Care Grants and Crisis Grants.	3 Minimising poverty, the cycle of deprivation and promoting equality	APS052 - Cost of Scottish Welfare Fund per application received - Target £24.00	WLAM	6.0	1,423,368		1,423,368
			APS072 - Percentage of spend against available budget - Target 100%.	WLAM				
<b>Entitlement - education</b>	Administration of school clothing grants, free school meals and milk and education maintenance allowance	3 Minimising poverty, the cycle of deprivation and promoting equality	APS082 Number of applications awarded Target 13,000	WLAM	2.8	1,710,860	(760,733)	950,127
<b>Entitlement - Blue Badge/NEC</b>	Entitlement schemes are supported and administered efficiently and effectively.	3 Minimising poverty, the cycle of deprivation and promoting equality	APS051 Unit cost of processing application - Target - £14	WLAM	1.7	84,941	(94,295)	(9,354)
			APS019 Percentage of Blue Badge applications processed within seven working days - Target - 90%	PUBLIC				
<b>Non-residential Contributions Financial Assessment</b>	Undertake financial assessments to determine contribution towards non-residential care	3 Minimising poverty, the cycle of deprivation and promoting equality	APS083 Average number of days to process new financial assessments - Target 20 days	WLAM	3.0	141,569	(56,564)	85,005
			APS084 Average number of days to process change of circumstances - Target 7 days	WLAM				

<b>Anti-Poverty Service – Activity Budget 2020/21</b>								
Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £
<b>Service support</b>	Provision of management and administrative support.	Enabler Service - Corporate Governance and Risk	Support activities contribute towards the overall performance of the service. Performance is monitored through the indicators for front line activities		2.0	84,941	(33,938)	51,003
<b>Total:</b>					<b>66.9</b>	<b>8,517,595</b>	<b>(2,228,605)</b>	<b>6,288,990</b>

**Actions 2020/21**

The service will undertake a range of actions to support corporate priorities and objectives, improve services and deliver transformation.

<b>Anti-Poverty Service Actions 2020/21</b>							
Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Refreshed Anti-Poverty Strategy</b>	Implementation and ongoing monitoring and reporting of the CPP strategy.	An effective strategy that will ensure council and community planning partners work collaboratively that will maximise the impact that the council and partners can achieve locally in positively addressing the causes of poverty and in mitigating the impact of poverty.	Anti-Poverty Manager	April 2020	March 2021	Active	A strategic action plan and scorecard have been agreed and an annual action plan developed to support achievement of outcomes. First annual Local Child Poverty Action Plan report published June 2019.
<b>Affordable Credit Project</b>	Implementation and monitoring of the project in partnership with Fife and Falkirk Councils.	Improving access of marginalised groups to obtain credit and embedded money advice to increase financial inclusion	Anti-Poverty Manager	April 2020	March 2021	Active	Project won the COLSA Excellence Award 2019 Work underway to move from shop to locality-based model.
<b>Non Residential Contributions Policy</b>	Development, implementation and on-going monitoring of objectives of the policy.	Improving understanding of the policy and ensuring those eligible for care are able to contribute to the cost by providing a means tested financial assessment along with a financial health check to increase uptake of entitlement.	Anti-Poverty Manager	April 2020	March 2021	Active	All financial assessments and support undertaken. Revised policy agreed October 2019 and now in place. Work ongoing to develop new software to support financial assessment and recovery of debt.

**Anti-Poverty Service Actions 2020/21**

Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Blue Badges/National Entitlement Card</b>	Entitlement schemes are supported and administered efficiently and effectively.	Improve automation of entitlement schemes to make it easier to apply.	Anti-Poverty Manager	April 2020	March 2021	Active	Activity transferred to the anti-poverty service. Software purchased to streamline process. Pilot project underway with Improvement Service and council digital team on identification and verification.
<b>Free School Meals/Clothing Grants and Education Maintenance Allowance</b>	Development and implementation of a simplified system for customers applying for benefit.	Increase the uptake of free school meals, clothing grants and educational maintenance allowance.	Anti-Poverty Manager	April 2020	March 2021	Active	Transferred activity to the anti-poverty service. Exploration of amending criteria for clothing grants to aid automation. Project underway with digital transformation team.
<b>Volunteering</b>	Map existing and potential volunteering opportunities and draft volunteering policy.	Improve the number of people choosing to volunteer with the council and to gain the Investor in Volunteering Standard within the Advice Shop.	Anti-Poverty Manager	April 2020	March 2021	Active	Mapping exercise extended to incorporate all education volunteering. Application submitted and external assessment undertaken for Investors in Volunteering.
<b>Food Insecurity</b>	Map food resources, develop a West Lothian Food Network underpinned by Food with Dignity principles.	Improve access to fresh, frozen and cooked foods to those experiencing food insecurity and to embed advice and support to alleviate hunger.	Anti-Poverty Manager	April2020	March 2021	Active	Mapping resources completed. Funding agreed at Council Executive December 2019 to support Food Network. Food Poverty conference planned March 2020.

## Audit, Risk and Counter Fraud Unit

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**Service manager:** Kenneth Ribbons, Audit, Risk and Counter Fraud Manager

**Number of staff:** 7.0 (full time equivalents)

**Location:** Civic Centre

### Purpose

The Audit, Risk and Counter Fraud Unit is responsible for ensuring there is a corporate framework in place which enables the council to effectively manage its risks.

The unit also independently conducts internal audits of key risks and investigates allegations of fraud or irregularity. The Audit Committee approves an annual internal audit plan and counter fraud plan. The Governance and Risk Committee approves an annual risk management plan. Following an internal audit or a counter fraud investigation, action plans are agreed with services to address any identified issues.

### Activities

The main activities of the unit during the period of the Management Plan will be to:

- ◆ Review and report on the adequacy of controls in relation to the council's key risks
- ◆ Prevent, detect and investigate fraud committed against the council
- ◆ Enable the council to effectively manage risk, reducing its cost and impact, and ensure the delivery of essential services

### Key Partners

The unit actively works with our partners to plan, design and deliver improved services for our customers.

Our key partners include; Police Scotland, NHS Lothian, Falkirk Council Internal Audit Service, the Scottish Local Authorities Chief Internal Auditors' Group (SLACIAG) and the Scottish Local Authorities Investigators' Group (SLAIG) and other council services.

## Customer Participation

The unit will actively engage with customers and potential customers in the delivery and re-design of services to ensure that they are accessible and focused on their needs and preferences.

### Customer Consultation Schedule 2020/21

Customer Group	Method	Frequency	Responsible Officer	Feedback Method
<b>Audit Committee</b>	Electronic Survey	Annually	Audit, Risk and Counter Fraud Manager	Consultation results reported to the Committee.
<b>Governance and Risk Committee</b>	Electronic Survey	Annually	Governance Manager	Consultation results reported to the Committee.
<b>Audit Committee, Senior Managers</b>	Consultation on annual audit plan	Annually	Audit, Risk and Counter Fraud Manager	Annual audit plan is approved by the Audit Committee. The approved plan is reported to the Governance and Risk Board and placed on the intranet.
<b>Audit / investigation point of contact</b>	Electronic survey	On completion of audit / investigation	Audit, Risk and Counter Fraud Manager	Questionnaire results published on intranet.
<b>Senior Managers</b>	Electronic survey	Annually	Senior Auditor	Questionnaire results published on intranet.

**Activity Budget 2020/21**

<b>Audit, Risk and Counter Fraud Unit Activity Budget 2020/21</b>								
Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £
<b>Risk Based Audits</b>	To independently review and report on the adequacy of controls in relation to the council's key risks.	Enabler service – Corporate Governance and Risk	IA012 Cost of internal audit cost per £1 million of West Lothian Council's net expenditure - Target £460	Public	3.0	159,280	(4,812)	154,468
			IA014 Percentage of risk based audits in the annual audit plan completed for the year - Target 100%	Public				
<b>Corporate Counter Fraud</b>	To prevent, detect and investigate fraud committed against the council.	Enabler service – Corporate Governance and Risk	IA041 Cost of counter fraud cost per £1 million of West Lothian Council's net expenditure - Target £320	High Level	3.0	159,280	0	159,280
			IA040 Average length of time (in weeks) to issue draft fraud reports - Target 16 weeks	Public				
<b>Risk Advice and Business Continuity Management co-ordination</b>	To enable the council to effectively manage risk, reducing its cost and impact, and ensure the delivery of essential services	Enabler service – Corporate Governance and Risk	IA023 Cost of risk management and business continuity cost per £1 million of West Lothian Council's net expenditure - Target £180	High Level	1.0	51,859	0	51,859

<b>Audit, Risk and Counter Fraud Unit Activity Budget 2020/21</b>							
Activity Name and Description	Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £
<b>Service support</b>	Provision of management and administrative Support	Enabler Service - Corporate Governance and Risk	IA021 Percentage of risks subject to annual documented risk assessment in Pentana Target 100%	Public	0.0	2,205	2,205
<b>Total:</b>				<b>7.0</b>	<b>372,624</b>	<b>(4,812)</b>	<b>367,812</b>



**Actions 2020/21**

The service will undertake a range of actions to support corporate priorities and objectives, improve services and deliver transformation.

<b>Audit, Risk and Counter Fraud Actions 2020/21</b>							
Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Risk Management Strategy 2018/19 to 2022/2023</b>	Implementation and ongoing monitoring and reporting of the council's corporate strategy.	An effective strategy that will ensure the council has a strong culture of high performance and capacity to deliver in the priorities.	Audit, Risk and Counter Fraud Manager	April 2020	March 2021	Active	Progress on the strategy will be reported during the year to the Governance and Risk Committee.
<b>Internal Audit and Counter Fraud Strategy 2018/19 to 2022/23</b>	Implementation and ongoing monitoring and reporting of the council's corporate strategy.	An effective strategy that will ensure the council has a strong culture of high performance and capacity to deliver in the priorities.	Audit, Risk and Counter Fraud Manager	April 2020	March 2021	Active	Progress on the strategy will be reported during the year to the Partnership and Resources PDSP and Audit Committee.

## Construction Services

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**Service manager:** Marjory Mackie, Construction and Design Manager

**Number of staff:** 42.2 (full time equivalents)

**Location:** Civic Centre

### Purpose

Construction Services provides multi-disciplinary professional and technical construction related services. The service reflects a strong corporate approach to the lifecycle management of the council's assets.

In 2020/21 a key aim of Construction Services is to continue to support and enable the delivery of the council's capital investment strategy through identification of planned improvements, projects and statutory compliance programmes. Successful delivery of property projects and planned improvements in support of this is essential and work streams such as the summer works programme ensure disruption to council services are avoided altogether or kept to a minimum.

The unit also ensures the operational availability of all non-housing properties owned by the council through a programme of planned and reactive maintenance including statutory and legislative compliance relating to the Fire Scotland Act 2005, Legionella, gas and electrical safety, and the Control of Asbestos Regulations. In addition, the unit manages the programme of condition surveys, bogus caller investigations, and provides building defect diagnosis and reports.

Key challenges in 2020/21 will include continuing to deliver the current range and level of services to ensure effective maintenance of the council's operational properties in accordance with asset management strategies at a time of challenging fiscal constraints and service and corporate transformation.

### Activities

The main activities of the service during the period of the Management Plan will be:

- ◆ Delivery of the capital programme of investment, including planned improvements, statutory compliance, property, housing and open space projects
- ◆ Annual delivery of over 350 individual projects with a total annual average expenditure of £30 million.
- ◆ Ensuring operational availability of council premises through effective management of revenue maintenance budgets and utilising IT systems in support of this
- ◆ Continued intensive management of statutory property compliance across council property
- ◆ Provision of construction feasibility, option appraisal, cost and maintenance information that supports business case development and future investment decisions
- ◆ Work on a number of modernisation and efficiencies projects

### Key Partners

The service actively works with our partners to plan, design and deliver improved services for our customers. Our key partners include; external contractors and consultants, Framework Consultant Partners, Scottish Fire and Rescue Service, Police Scotland, Hub South East Scottish Procurement Alliance (SPA) and Scottish Futures Trust and other council services.

## Customer Participation

The service will actively engage with customers and potential customers in the delivery and re-design of services to ensure that they are accessible and focused on their needs and preferences.

### Customer Consultation Schedule 2020/21

Customer Group	Method	Frequency	Responsible Officer	Feedback Method
<b>Customers about to have major work undertaken</b>	Design review and consultation meetings	Monthly	Project Officers	Minutes and revised proposals circulated to all relevant parties.
<b>Customers and Service leads during project development</b>	Key Stage Reports and Project Governance documentation presented at Project Board	In line with Key Stages in Plan of Work	Project Officers	Project Board minutes distributed to all present.
<b>Customers – all projects (internal and external) post project review</b>	E-survey creator	Two Months post-practical completion (results collated quarterly)	Project Officers	Results are sent to respondents and posted on the intranet.
<b>Customers – major projects post occupancy evaluation (POE)</b>	Meeting / structured workshop	One year post completion	Team Leader	Results are sent to customers and specific learning points incorporated into Employers Design Requirements for future projects.
<b>Customers who have requested repairs through the Property Helpdesk</b>	E-survey creator	Quarterly	Team Principal	Results are posted on the intranet.

**Activity Budget 2020/21**

<b>Construction Services Activity Budget 2020/21</b>							
Activity Name and Description	Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £
<b>Property Capital Investment Programme - Property Capital Projects</b> To deliver General Services (Property) major construction and Planned Improvement projects using in-house resources and external consultants.	Enabler service – Financial Planning	P:CSg601 Percentage of Total Capital Programme Spend Delivered in Year by Construction Services. - Target 100%	Public	21.6	1,080,504	(1,080,504)	0
		CSg651 Percentage of projects delivered on time (GS property) - Target 100%	WLAM				
<b>Open Space Capital Investment Programme - Open Space Capital Projects</b> To deliver General Services (Open Space) major construction projects using in-house resources and external consultants.	Enabler service – Financial Planning	P:CSg601 Percentage of Total Capital Programme Spend Delivered in Year by Construction Services. - Target 100%	Public	0.5	21,610	(21,610)	0
		CSg652 Percentage of projects delivered on time (GS Open Space) - Target 100%	WLAM				
<b>Housing Capital Investment Programme - Housing Capital Projects</b> To deliver Housing funded major construction projects using in-house resources and external consultants.	Enabler service – Financial Planning	P:CSg601 Percentage of Total Capital Programme Spend Delivered in Year by Construction Services. - Target 100%	Public	4.0	216,101	(216,101)	0
		CSg653 Percentage of projects delivered on time (Housing) - Target 100%	WLAM				

<b>Construction Services Activity Budget 2020/21</b>							
Activity Name and Description	Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £
<b>Maintenance and compliance of the council's operational and non-operational property stock</b>	To manage and coordinate all repairs, cyclical maintenance and property inspections of the council's operational and non-operational properties. To manage and coordinate all tests, inspections, risk assessments and related information required to meet with property and health and safety legislation.	Enabler service – Financial Planning	P:CSg803 Maintenance Services cost as a percentage of net Revenue Expenditure (Corporate Property) - Target 9.5%	Public	16.1	842,793	(842,793)
			CSg409 Percentage of Operational Properties with an Asbestos Register - Target 100%	WLAM			
			CSg430 Percentage of Properties with a Fire Safety Risk Assessment (FSRA) updated within the last five years - Target 100%	High Level			
<b>Total:</b>				<b>42.2</b>	<b>2,161,008</b>	<b>(2,161,008)</b>	<b>0</b>

**Actions 2020/21**

The service will undertake a range of actions to support corporate priorities and objectives, improve services and deliver transformation.

<b>Construction Services Actions 2020/21</b>							
Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Development, implementation and management of the IT System that manages property assets</b>	Management, monitoring and further development of Asset Management IT software system.	To enable ongoing asset management of non-housing council buildings and streamline maintenance and compliance processes.	Construction and Design Manager	April 2020	March 2021	Active	Repairs helpdesk in place and system implemented for all orders & invoicing. Asbestos module in development for implementation in 2020.
<b>Development, implementation, management, monitoring and delivery of property projects</b>	Management of projects & investment in support of the Property Capital Programme of investment, the West Lothian Local Housing Strategy, the Early Learning and Childcare expansion and the Transformation Programme.	Success delivery of investment programme with improved council assets and accommodation which meets the needs of service users and supports efficiencies in service delivery.	Construction and Design Manager	April 2020	March 2021	Active	Detailed project briefs established with management and monitoring arrangements in place.
<b>Development, implementation, management and monitoring the programme of statutory compliance across the operational property estate</b>	An effective plan and programme that ensures public, staff and users able to access and use council facilities safely and in full compliance with property related legislation, including (but not restricted to) management of asbestos, fire safety, gas safety, electrical safety and legionella.	Operational properties remain open and safe for use at all times.	Construction and Design Manager	April 2020	March 2021	Active	Detailed programmes in place and reviews of policies in support of programmes (Asbestos, Fire Safety, Legionella) ongoing.

## Financial Management Unit

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- Manager:** Patrick Welsh, Corporate Finance Manager  
**Number of Staff:** 36.6 (full time equivalents)  
**Locations:** Civic Centre

### Purpose

The Financial Management Unit (FMU) provides a wide range of financial services. It is responsible for developing revenue and capital financial strategies and for the annual management of budgets through a risk based approach to budget monitoring. Other core activities support and enable service delivery across the council and include insurance cover and advice, VAT and treasury management, accounts payable and preparation of the statutory statements of account.

In 2020/21 a key aim of FMU is to continue to support and enable council services to deliver the agreed revenue and capital budgets for 2020/21 within approved budgets.

In addition, FMU will coordinate the financial delivery of a priority based three year revenue budget plan for 2020/21 to 2022/23, which sets out how the council's Corporate Plan priorities will be delivered against the backdrop of an extremely challenging financial climate, which will generate considerable pressure around balancing budgets within expenditure demands and funding constraints.

### Activities

The main activities of the service during the period of the Management Plan will be:

- ◆ Budget Strategy and Planning
- ◆ Annual Budget Management and Monitoring
- ◆ Purchase to Pay
- ◆ Finance Systems Maintenance and Development
- ◆ Treasury, Insurance and VAT Management
- ◆ Final Accounts and statutory returns
- ◆ West Lothian Integration Joint Board financial management support

### Key Partners

The service actively works with our partners to plan, design and deliver improved services for our customers.

Our key partners include; Audit Scotland, our external auditors Ernst and Young, West Lothian Integration Joint Board, NHS Lothian, West Lothian Community Planning Partners, HM Revenue and Customs, Chartered Institute of Public Finance and Accountancy (CIPFA), Convention of Scottish Local Authorities (COSLA), West Lothian Leisure and Hubco, and other council services.

## Customer Participation

The service will actively engage customers and potential customers in the delivery and re-design of services to ensure that they are accessible and focused on their needs and preferences.

### Customer Consultation Schedule 2020/21

Customer Group	Method	Frequency	Responsible Officer	Feedback Method
<b>Head of Service</b>	Engagement meetings	Annually	Corporate Finance Manager	Action Note of meetings
<b>Budget Holders</b>	Budget meetings	Quarterly	Accountant	Action Note of Meetings
<b>All customer groupings (Service Managers/Budget Holders, Partner Organisations, Council Suppliers)</b>	Electronic survey	Annually	Group Accountant	Results posted on Intranet



**Activity Budget 2020/21**

<b>Financial Management Unit Activity Budget 2020/21</b>								
Activity Name and Description	Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £	
<b>Budget Strategy and Planning</b>	Preparation of annual and medium term revenue and capital budgets and strategies.	Enabler service – Financial Planning	FM021 Cost of providing a financial management function per £1 million of council revenue budget - Target £3.00	High Level	6.3	457,633	(75,710)	381,923
			CP:FM003 Annual revenue budget approval within set deadlines - Target 100%	WLAM				
<b>Annual Budget Management and Monitoring</b>	Manage and Monitor the annual Capital and Revenue budgets including provision of financial advice, VAT management, Grant Claims and completion of Statistical Returns.	Enabler service – Financial Planning	FM021 Cost of providing a financial management function per £1 million of council revenue budget - Target £3.00	High Level	13.9	1,037,522	(169,233)	868,289
			FM014 Budget monitoring - compliance with timescales for formal reporting - Target 100%	WLAM				
<b>Final Accounts</b>	Preparation of Final Accounts with the aim of securing an unqualified audit certificate.	Enabler service – Corporate Governance and Risk	FM021 Cost of providing a financial management function per £1 million of council revenue budget - Target £3.00	High Level	3.4	242,276	(40,082)	202,194

Financial Management Unit Activity Budget 2020/21								
Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £
<b>Treasury Management</b>	Operate an effective Treasury Management Strategy for Loans and Borrowing and Cash Management function.	Enabler service – Financial Planning	FM006 Final Accounts - unqualified audit certificate and reporting within agreed deadlines - Target 100%	High Level				
			FM097 Average cost of servicing loans fund advances in year, interest & expenses - Target 4.5%	High Level	1.2	80,759	(13,361)	67,398
			FM070 Treasury Management - investment rate of return – Target 0.85%	High Level				
<b>Systems support and records management</b>	Maintain and manage the Financial Ledger and Financial Records.	Enabler service – Corporate Governance and Risk	FM021 Cost of providing a financial management function per £1 million of council revenue budget - Target £3.00	High Level	3.2	242,276	(40,082)	202,194
			FM096 Financial ledger and records maintained in accordance with agreed policies and procedures - Target 100%	WLAM				
<b>Purchase to Pay</b>	To provide a comprehensive, cost effective accounts payable service.	Enabler service – Financial Planning	CP:FM022 Purchase to pay cost per invoice - Target £0.95	High Level	6.0	430,713	(71,256)	359,457

Financial Management Unit Activity Budget 2020/21								
Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £
			SCORP08 Percentage of invoices sampled that were paid within 30 days - Target 96%	High Level				
<b>Insurance Fund Management</b>	To manage the cost of insurance risk.	Enabler service – Financial Planning	FM080 Total cost of providing the Council's insurance service per £1 million of council revenue budget - Target £9,000	WLAM	2.2	161,517	(26,721)	134,796
<b>Service support</b>	Provision of management and administrative Support.	Enabler service – Corporate Governance and Risk	Support activities contribute towards the overall performance of the service. Performance is monitored through the indicators for front line activities.		0.4	53,839	(8,907)	44,932
<b>Total:</b>					<b>36.6</b>	<b>2,706,535</b>	<b>(445,352)</b>	<b>2,261,183</b>

**Actions 2020/21**

The service will undertake a range of actions to support corporate priorities and objectives, improve services and deliver transformation.

<b>Financial Management Unit Actions 2020/21</b>							
Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Revenue Budget Strategy</b>	Development, implementation and ongoing monitoring and reporting of the council's revenue budget strategy.	An effective strategy and monitoring process that provides assurance through regular and timely reporting on the financial delivery of the council's approved revenue budget plans within available resources.	Head of Service	April 2020	March 2019	Active	Monitoring of delivery arrangements for 2020/21 budget and update on progress towards delivery of savings for 2020/21 to 2022/23.
<b>Capital Budget Strategy</b>	Development, implementation and ongoing monitoring and reporting of the council's capital budget strategy.	An effective strategy and monitoring process to provide assurance through regular and timely reporting on the delivery of the council's approved capital budget plans within available resources.	Head of Service	April 2020	March 2021	Active	Monitoring of delivery of 2020/21 Capital programme.
<b>Health and Social Care Finance</b>	Development of integrated financial management and planning taking account of Audit Scotland and Ministerial Strategic Group recommendations	Effective joint working arrangements in place across council, NHS Lothian and IJB to aid integrated financial planning for Health and Social care services.	Corporate Finance Manager / IJB S95 Officer	April 2020	March 2021	Active	Progress on financial management and planning will be reported as part of updates to relevant Council and IJB meetings.

## Property Management and Development

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**Manager:** Paul Ketrick, Estates Manager

**Number of Staff:** 31.0 (full time equivalents)

**Locations:** Civic Centre and various Partnership Centres

### Purpose

Property Management and Development is responsible for the management of the council's operational property assets. Services to internal and external customers include strategic direction on the management of the council's property assets and prioritising and deploying capital and revenue resources to sustain and improve the council's property asset performance. The unit is also responsible for the management of energy and the council's carbon commitment obligation, together with the management of corporate administration buildings and partnership centres. The council's commercial property portfolio, development land and joint ventures are also the responsibility of the unit and support the council's economic development objectives. Professional property management services delivered by the unit include statutory valuations, acquisitions, disposals, property transaction negotiations, development advice and management, business case development, property project management, commercial property intelligence and advocacy, and managing community asset transfers. The unit is responsible for the management of the council's Public Private Partnership (PPP) contracts.

Key challenges in 2020/21 include continuing to deliver the current range and level of services to ensure effective and efficient management of the council's property assets in accordance with the various property asset management strategies, plans, programmes and projects at a time of challenging fiscal constraints and both service and corporate transformation.

### Activities

The main activities of the service during the period of the Management Plan will be:

- ◆ Strategic property asset management including development and delivery of the Corporate Asset
- ◆ Strategic property asset management including ongoing development and delivery of the Corporate Asset Management Strategy, Property Asset Management Plan, Learning Estate Management Plan and other property based initiatives, projects and programmes.
- ◆ Management of the Property Capital Programme, including project delivery by external and internal professional teams.
- ◆ Management of council premises, (including PPP schools and partnership centres), energy and water, together with the associated revenue and capital related budgets
- ◆ Management of the council's tenanted non-residential property portfolio (TNRP)
- ◆ Professional services including disposals, statutory valuations, property records and property advice
- ◆ Work on various property focused service modernisation, efficiency and effectiveness projects and programmes.

### Key Partners

The service actively works with our partners to plan, design and deliver improved services for our customers. Our key partners include; NHS Scotland – various Partnership Centres (existing and proposed), Police Scotland – various Partnership Centres (existing and proposed), Scottish Court Service and HUB South East Territory Partners and other council services.

## Customer Participation

The service will actively engage with customers and potential customers in the delivery and re-design of services to ensure that they are accessible and focused on their needs and preferences.

### Customer Consultation Schedule 2020/21

Customer Group	Method	Frequency	Responsible Officer	Feedback Method
<b>Customers (internal and external)</b>	Electronic survey	Annually	Commercial Property Surveyor	Results are sent to respondents and posted on the internet
<b>Commercial tenants and occupiers of admin buildings</b>	Electronic survey	Biennially	Commercial Property Surveyor	Results posted on the internet and/or posted to respondents
<b>Civic Centre and Partnership Centres user groups</b>	Meetings	Quarterly	Group Facilities Manager	Minutes of meetings
<b>Heads of Service &amp; Senior Responsible Officers</b>	Engagement and Board meetings	Monthly	Corporate Estates Manager	Action Note of meetings

**Activity Budget 2020/21**

Property Management and Development Activity Budget 2020/21								
Activity Name and Description	Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £	
<b>Strategic Property Asset Management</b>	The efficient and effective management of the council's operational properties.	Enabler Service - Modernisation and Improvement	PMD151 Cost of providing the service – Target £6.64 per head of population	WLAM	2.5	174,518	0	174,518
			SCORPASSET02 Proportion of Internal Floor Area of Operational Properties in Satisfactory Condition - Target 99.4%	Public				
<b>Disposal of surplus land and property</b>	Delivering a programme of property disposals to support the Council's capital investment programme.	Enabler service – Financial Planning	PMD151 Cost of providing the service – Target £6.64 per head of population  TBC – Capital receipt income against target	WLAM	1.5	31,602	(636)	30,966
<b>Management of the Tenanted Non Residential Property Portfolio</b>	The efficient and effective management of the council's commercial portfolio to maximise income and to maintain long term performance.	Enabler service – Financial Planning	PMD151 Cost of providing the service – Target £6.64 per head of population	WLAM	5.0	778,618	(4,766,659)	(3,988,041)
			P:PMD164 Percentage of rent outstanding for Commercial Property, (Current debt) - Target 4.58%	Public				

**Property Management and Development Activity Budget 2020/21**

Activity Name and Description	Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £	
<b>Professional services</b>	Including: Valuation for capital accounting purposes; maintenance of property records; granting property rights; provision of expert advice; development of land and buildings for economic development purposes and provision of advice to migrant and growing businesses.	Enabler service – Financial Planning	P:PMD127 PM&D percentage of customers rating the service as good or excellent - Target 94.6%	Public	5.2	108,665	(2,187)	106,478
			PMD169 Asset valuations input to the Atrium within agreed timescales - Target 100%	WLAM				
<b>Energy management and climate change</b>	Ensuring effective energy and water management in corporate non-domestic properties through energy efficiency measures. Developing potential projects, analyse consumption trends and setting targets.	Enabler service – Financial Planning	PMD191 Carbon emissions from energy used in buildings (Annually) - Target 24,672 tonnes	WLAM	2.0	130,712	0	130,712
			PMD196 Percentage completion of Energy Performance Certificates in operational buildings where required - Target 99%	WLAM				
<b>The facilities management of the Council's Corporate Partnership Properties</b>	Providing an efficient and effective facilities management function in the council's principal office buildings and Partnership Centres.	Enabler service – Financial Planning	PMD133 - Customer Satisfaction - Council Officers - Target 90%	WLAM	12.0	4,980,552	(3,098,395)	1,882,157
			SCORPASSET02 - Percentage of Operational Properties in Satisfactory Condition - Target 99.4%	Public				



Property Management and Development Activity Budget 2020/21								
Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £
<b>The management of the Council's Corporate Properties and PPP</b>	The efficient and effective management of the council's operational properties.	Enabler service – Financial Planning	PMD151 (9a.1a) - cost of providing the service. Target - £6.64 per head of population	WLAM	2.5	17,457,152	(469,233)	16,987,919
			SCORPASSET02 - Proportion of Internal Floor Area of Operational Buildings in Satisfactory Condition: Target 99.4%	Public				
<b>Cyclical Maintenance (Admin &amp; Corp)</b>	Management of the councils cyclical property maintenance budgets and providing strategic guidance on prioritisation	Enabler Service - Financial Planning	SCORPASSET02 - Proportion of Internal Floor Area of Operational Buildings in Satisfactory Condition: 99.4%		0.1	2,218	(45)	2,173
<b>Reactive Maintenance (Admin &amp; Corp)</b>	Management of the councils cyclical property maintenance budgets and providing strategic guidance on prioritisation	Enabler Service - Financial Planning	SCORPASSET02 - Proportion of Internal Floor Area of Operational Buildings in Satisfactory Condition: 99.4%		0.1	2,218	(45)	2,173
<b>Service support</b>	Provision of management and administrative Support.	Enabler service – Financial Planning	Support activities contribute towards the overall performance of the service. Performance is monitored through the indicators for front line activities		0.1	1,663	(33)	1,630
<b>Total:</b>					<b>31.0</b>	<b>23,667,918</b>	<b>-8,337,233</b>	<b>15,330,685</b>

**Actions 2020/21**

The service will undertake a range of actions to support corporate priorities and objectives, improve services and deliver transformation.

<b>Property Management and Development Actions 2020/21</b>							
Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Corporate Asset Management Strategy</b>	Implementation and ongoing monitoring and reporting of the actions contained in the council's corporate asset management strategy.	Effective delivery of the strategy including a framework of performance measures for the management of all council assets.	Corporate Estates Manager	April 2020	March 2021	Active	Monitoring of actions and performance indicators in the Corporate Asset Management Strategy.
<b>Delivery of Capital Programme (Property)</b>	Management of Property Capital Programme	Ongoing management, monitoring and reporting of Property Capital Programme and investments within it.	Corporate Estates Manager	April 2020	March 2021	Active	Detailed management and monitoring arrangements in place.
<b>Property Asset Management Plan</b>	Implementation, management, monitoring and reporting of the council's property asset management plan and its activities.	An effective plan that delivers the actions and activities to ensure the effective and efficient management of the council's property assets.	Asset Manager	April 2020	March 2021	Active	Monitoring of actions and performance indicators.
<b>Learning Estate Management Plan</b>	Development, implementation, management, monitoring and reporting of the council's learning estate management plan and its activities.	An effective plan that establishes the actions and activities to ensure the effective and efficient management of the council's learning estate.	Property Capital Programme and Projects Principle	April 2020	June 2020	Active	The draft plan will proceed to Education PDSP and then to Education Executive for approval.

**Property Management and Development Actions 2020/21**

Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Learning Estate Investment Projects and Programmes</b>	Management of major learning estate investments including refurbishments and planned Improvements	Effective and efficient development, implementation, monitoring and reporting of significant learning estate investment programmes to ensure value for money, delivery timescales and budget parameters are achieved.	Property Capital Programme and Projects Principle	April 2020	Mar 2021	Active	Investment projects programmes will be reported to the Council Executive and Education Executive as appropriate.
<b>New and Replacement Schools Projects</b>	Lead development of funding business cases, implementation, construction, management and commissioning of learning estate projects part funded through Scottish Government Programme.	Securing of additional investment in Learning Estate from Scottish Government and successful implementation and management of projects.	Property Capital Programme and Projects Principle	April 2020	Mar 2021	Active	Initial feasibilities undertaken and business cases developed. Beattie ASN School successful for pilot phase. Guidance from Scottish Government further phases being considered.
<b>Climate Change Strategy, Energy Management and Carbon Management Plan</b>	Climate Change Strategy and Carbon Management Plan to be renewed and recalibrated.	Review, Amend and Recast Climate Change Strategy and Carbon Management Plan	Energy Manager	April 2020	Oct 2021	Planned	Review in light of climate emergency declaration will proceed to Environment PDSP then Council Executive.
<b>Commercial Property Strategy</b>	Implementation and ongoing monitoring and reporting of the actions contained in the council's Commercial Property Strategy.	A comprehensive strategy that delivers the actions and activities to ensure the effective and efficient management of the council's commercial property assets that is demonstrated through performance measures.	Group Commercial Property Surveyor	April 2020	March 2021	Active	Monitoring of actions and performance indicators in the strategy reported annually.

## Revenues Unit

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**Manager:** Scott Reid, Revenues Manager

**Number of Staff:** 53.1 (full time equivalents)

**Locations:** St David House

### Purpose

The Revenues Unit is responsible for council tax and business rates billing, administration and collection, providing a direct front line service to all households and businesses in West Lothian.

The unit is also responsible for the collection of miscellaneous income, collection of housing benefit overpayments and underpinning the council's holistic approach to dealing with customers who have multiple debts due to the council through the work of the corporate debt team. The service manages income received through multiple payment channels in excess of £600 million annually.

During 2020/21 the unit will look to maximise income to the council whilst minimising the costs of collection. The unit will continue to modernise and transform service provision, with customer communication and consultation playing a key part in its modernisation activity. The unit will work across services to develop effective strategies in relation to the corporate debt approach. The unit will work closely with stakeholders and partners to plan and prepare for the ongoing impact of welfare reform.

### Activities

The main activities of the service during the period of the Management Plan will be:

- ◆ Council Tax
- ◆ Non-Domestic Rates
- ◆ Service Accounts
- ◆ Corporate Debt
- ◆ Income Management

### Key Partners

The service actively works with our partners to plan, design and deliver improved services for our customers.

Our key partners include; Department for Work and Pensions, Scottish Government, Lothian Valuation Joint Board, Business Improvement District Companies and other council services.

## Customer Participation

The service will actively engage customers and potential customers in the delivery and re-design of services to ensure that they are accessible and focused on their needs and preferences.

### Customer Consultation Schedule 2020/21

Customer Group	Method	Frequency	Responsible Officer	Feedback Method
<b>Council taxpayers</b>	Paper-based and electronic surveys	Daily	Revenues Manager	Results posted on internet, Council Tax booklet and email
<b>Business ratepayers</b>	Paper-based and electronic survey	Daily	Revenues Manager	Results posted on internet, Business Rates booklet and email
<b>Council services</b>	Electronic survey	Annually	Revenues Manager	Results posted on internet and email
<b>Revenues system users</b>	Electronic survey	Daily	Revenues Manager	Incident Tool – software system issues and email

**Activity Budget 2020/21**

Revenues Unit Activity Budget 2020/21								
Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £
<b>Council Tax</b>	Billing, collection and administration of Council Tax and Water Service Charges.	Enabler service – Financial Planning	SCorp04 - Cost of collecting Council Tax per dwelling - Target £5.00.	Public	20.0	962,200	(739,919)	222,281
			SCorp07 - percentage of income due from Council Tax for the year that was received by the end of the year - Target 96.5%	Public				
<b>Corporate Debt</b>	Collection of multiple debts due to the council, and Housing Benefit overpayments.	Enabler service – Financial Planning	REV149 – Customer income and/or debt reduction generated per pound of staff costs for Corporate Debt Team activity - Target £10.00	WLAM	9.6	455,779	(1,071,631)	(615,852)
			REV009 - Cumulative value of Housing Benefit Overpayment recovered - Target £1 million	WLAM				
<b>Non-Domestic Rates</b>	Billing, collection and administration of Non Domestic Rates.	Enabler service – Financial Planning	REV014 - Business Rates cost per property - Target £1.00	WLAM	2.0	101,284	(17,948)	(83,336)
			REV002 - Percentage of Business Rates received in the year - Target 97.7%	WLAM				

Revenues Unit Activity Budget 2020/21								
Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2020/21	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2020/21 £	Revenue Income Budget 2020/21 £	Net Revenue Budget 2020/21 £
<b>Service Accounts</b>	Collection of the council's service accounts.	Enabler service – Financial Planning	REV016 - Cost of collection for service accounts - Target £8.00	WLAM	2.0	101,284	(17,947)	83,337
			REV083 - Outstanding service account debt over 12 months - Target £260,000	WLAM				
<b>Business Systems</b>	Provision of a business systems function, including identification of financial error, compliance checks, process development, income management and administration of rent accounting system	Enabler Service - Financial Planning	REV148 - Cost of Business Systems team per £1 million of payments processed – Target £700.00.	WLAM	13.5	633,026	(157,970)	475,056
			REV068 - Percentage of e-returns processed within 6 days - 99%	WLAM				
<b>Service support</b>	Provision of management and administrative Support.	Enabler service – Corporate Governance and Risk	REV111 - Cost of Business Support per £1 million of income generated - £80.00.  REV131 - The average number of working days to process Council Tax and Business Rates refunds from the date the credit bill is generated. - Target 6 days.	WLAM	6.0	278,532	(49,358)	229,174
<b>Total:</b>					<b>53.1</b>	<b>2,532,105</b>	<b>(2,054,773)</b>	<b>477,332</b>

**Actions 2020/21**

The service will undertake a range of actions to support corporate priorities and objectives, improve services and deliver transformation.

<b>Revenues Unit Actions 2020/21</b>							
Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Service Redesign, Integration &amp; Modernisation projects</b>	Develop integrated customer online forms for Council Tax changes that automatically update the back office system.	Customers are able to update their own Council Tax account details.	Revenues Manager	April 2019	September 2020	Active	Integrated online forms have been identified for development however implementation is dependent upon the upgrade of our Digital 360 workflow system with this project due to complete by 31 March 2020.
<b>Service Redesign, Integration &amp; Modernisation projects</b>	Procure an income management and cash receipting system.	Implementation of an income management and cash receipting system that provides improved customer experience and efficiencies in payment processing.	Revenues Manager	April 2019	March 2020	Active	Project to upgrade our income management and cash receipting system is ongoing and due to complete by 31 March 2020.
<b>Service Redesign, Integration &amp; Modernisation projects</b>	Develop processes linked to the Council Tax online portal that will allow customers to track the progress of their change of circumstance enquiry.	Customers who make a change of circumstance enquiry are able to track progress to completion through the online portal.	Revenues Manager	April 2020	March 2021	Planned	Initial discussions on customer display undertaken.



**Revenues Unit Actions 2020/21**

Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Service Redesign, Integration &amp; Modernisation projects</b>	Further develop and roll out Training Needs Analysis to front line services dealing with customer Council Tax enquiries.	Front line staff have undertaken the Training Needs Analysis and identified training needs have been delivered facilitating improved customer service.	Revenues Manager	April 2020	March 2021	Active	Development of the basic level Training Needs Analysis is progressing with refinement being undertaken following feedback from the trial group.

# Developing the Management Plan and reporting progress

The Management Plan was developed to support the delivery of the Council's Corporate Plan and to take account of a range of factors that are likely to impact on the delivery of council services in the next three years.

## Context

The next three years will be a period of significant challenge for the council with ongoing spending constraints expected to continue. However, the council has clearly defined long term aims relating to the development of high quality services, designed to meet the needs of its customers. These long term aims are captured in the Local Outcome Improvement Plan, the Community Plan and in the council's Corporate Plan and together these strategic plans determine the work of the council's services.

The development of the Corporate Plan 2018/23 has been directly influenced by the views of the people living and working in West Lothian, ensuring that all employees are focused on meeting the needs of a growing and vibrant community. The Corporate Plan sets the strategic priorities for the council up to 2022/23 and this will be the continued focus for all council services during the period.

This will help to ensure that we continue to tackle the most important issues for West Lothian. Also, that we invest in and prioritise the services which make the most significant contribution to the achievement of positive outcomes.

## Influences

There will be many internal and external factors which will influence the work of Finance and Property Services. The more prominent include:

- ◆ The impact of the UK leaving the European Union
- ◆ Level of Scottish Government grant funding
- ◆ Introduction and roll out of the Scottish Social Security System
- ◆ Child Poverty (Scotland) Act 2017
- ◆ Continued welfare changes
- ◆ The ongoing implementation of Universal Credit Full Service and other changes related to welfare reform
- ◆ Changes to processes as Department for Work and Pensions continue to develop the Universal Credit model as roll out progresses
- ◆ Impact of Universal Credit Full Service on Discretionary Housing Payment and Scottish Welfare Fund budgets
- ◆ Implementation of planned statutory changes to the Business Rates system
- ◆ Increase in customers with multiple debts due to the council as a result of Universal Credit Full Service
- ◆ Management and staff restructures following the approval of the council's three year revenue budget.

## Planning Process

The Management Plan was developed by the Finance and Property Services Management team, using a range of information to ensure that services, activities and resources are aligned to:

- ◆ The council's Corporate Plan and the deliverables for which Finance and Property Services will be responsible for achieving or contributing to
- ◆ Support the delivery of the council's transformation programme and Digital Transformation strategy
- ◆ Support the delivery of the corporate strategies, including the four that are the direct responsibility of the service for developing and monitoring implementation in the council; the Corporate Asset Management Strategy, Risk Management Strategy, Audit and Counter Fraud Strategy, and the Anti-Poverty Strategy

The process and timescales for the development and publication of the management plan are set out, including consultation with the appropriate stakeholders.




Corporate Plan	The Corporate Plan is approved by West Lothian Council, setting out the key priorities for all council services for the period 2018/19 to 2022/23.	13 February 2018
Finance and Property Services Planning	The service management team develop the plan taking account of a range of factors, business requirements and customer needs.	February to March 2020
Executive Management Team approval	The council's executive management team (EMT) review all service management plans to ensure they are sufficiently focused on corporate priorities. The EMT will also review the plans annually, scrutinising performance and progress in the stated outcomes and actions.	March 2020
PDSP consultation	The Management Plan is taken to the Partnership and Resources Policy Development and Scrutiny Panel(s) for consultation, providing Panel members the opportunity to shape planning and resource allocation.	5 June 2020
Management Plan launch	The service cascades the plan to Finance and Property Service employees to ensure that they understand the key priorities and challenges ahead and how they will contribute to successful outcomes.	June 2019
WLC website	The Management Plan is published on the council's website to provide detailed information for the public and external stakeholders on council services, resource allocation and performance.	30 June 2020
Management Plan updates	The Management Plan progress is reviewed by the Partnership and Resources PDSP each year	April to June












## **Continuous Improvement**

Finance and Property Services will continue to play a key role in the development and support of high quality customer services. Finance and Property Services will engage with our customers to modernise structures and processes to ensure that they continue to provide the most efficient and effective model for service delivery, including:

- ◆ Using Staff Improvement Groups to review, streamline and modernise processes and improve customer outcomes
- ◆ Better demonstrating and evidencing the variety of benchmarking activity undertaken
- ◆ Implementing actions arising from the West Lothian Assessment Model (WLAM) process in each unit
- ◆ Monthly review of performance by the Finance and Property Services senior management team and the management teams in each unit
- ◆ Ongoing engagement with staff and customers on potential process and service improvements

## Finance and Property Services Scorecard

The service will report on the following key measures of the success throughout the lifetime of our plan (short term trend arrows: 2019/20 performance exceeded the target =  / 2019/20 performance met the target =  / 2019/20 performance was below the target = ):

<b>Indicators</b>					
WLAM unit / service	PI Code and Short Name	2019/20 Performance	2019/20 Target	Performance against Target	2020/21 Target
<b>Anti-Poverty Service</b>	APS007_ Percentage of customers who rated the overall quality of the service as good or excellent	99.6%	99%		99%
	APS017_ Total number of complaints received by the Anti-Poverty Service	15	20		20
	APS055_ Unit cost of Advice Shop customer enquiries	£31	£32		£32
	APS074_ Total annual amount the Anti-Poverty Service has gained in extra benefits for its customers	£27,358,018	£27,500,000		£27,000,000
<b>Audit, Risk and Counter Fraud Unit</b>	P:IA007_ Percentage of customers who rated the overall quality of the service provided by internal audit as good or excellent	100%	100%		100%
	P:IA066_ Total number of complaints received by Audit, Risk and Counter Fraud	0	0		0
	P:IA012_ Cost of internal audit per £1 million of West Lothian Council's net expenditure	£457.00	£460		£460
	P:IA014_ Percentage of audits in the annual audit plan completed for the year	100%	100%		100%
<b>Construction Services</b>	CSg100_ Percentage of customers who rated the overall quality of the service as good or excellent	89%	92%		92%
	CSg112_ Total number of complaints received by Construction Service	8	10		12
	P:CSg803_ Maintenance Services cost as a percentage of net Revenue Expenditure (Corporate Property)	9.4%	9.5%		9.4%
	P:CSg601_ Percentage of Total Capital Programme Spend Delivered in Year by Construction Services	100%	100%		100%

<b>Indicators</b>					
WLAM unit / service	PI Code and Short Name	2019/20 Performance	2019/20 Target	Performance against Target	2020/21 Target
<b>Financial Management Unit</b>	FM082_Percentage of customers who rated the overall quality of the service as good or excellent.	96%	98%	↓	96%
	FM037_Number of complaints received by the Financial Management Unit	3	3	–	3
	FM021_Total/unit cost of providing the service per £1 million of council revenue budget	£2,770	£3,000	↑	3,000
	FM091_Budget Strategy & Planning – Compliance with Timescales for Reporting	100%	100%	–	100%
<b>Property Management and Development</b>	P:PMD127_Percentage of Customers rating the service as good or excellent	94.6%	94%	↑	94%
	PMD144_Total number of complaints received by the Property Management and Development	12	12	–	12
	PMD153_Total/unit cost of providing service per £1m of council revenue budget	£2,572	£3,000	↑	£3,000
	P:PMD164_Percentage of rent outstanding for commercial property	3.86%	4%	↑	4%
<b>Revenues</b>	P:REV042_Percentage of respondents who rated the overall quality of service delivered by the Revenues Unit as good or excellent.	91%	91%	–	92%
	REV122_Total number of complaints received by Revenues Unit	90	100	↑	100
	SCorp04_Cost of Council Tax collection per dwelling	£5.40	£5.40	–	£5.50
	SCorp07_Percentage of Income due from Council Tax Received by the End of the Year	96.5%	96.4%	↑	96.6%

This scorecard offers a high level snapshot of the service performance. More information about the performance of Corporate Services can be viewed via the council's website: [www.westlothian.gov.uk/performance](http://www.westlothian.gov.uk/performance)

# Finance and Property Services Management Plan 2020/21

**June 2020**

For more information:

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