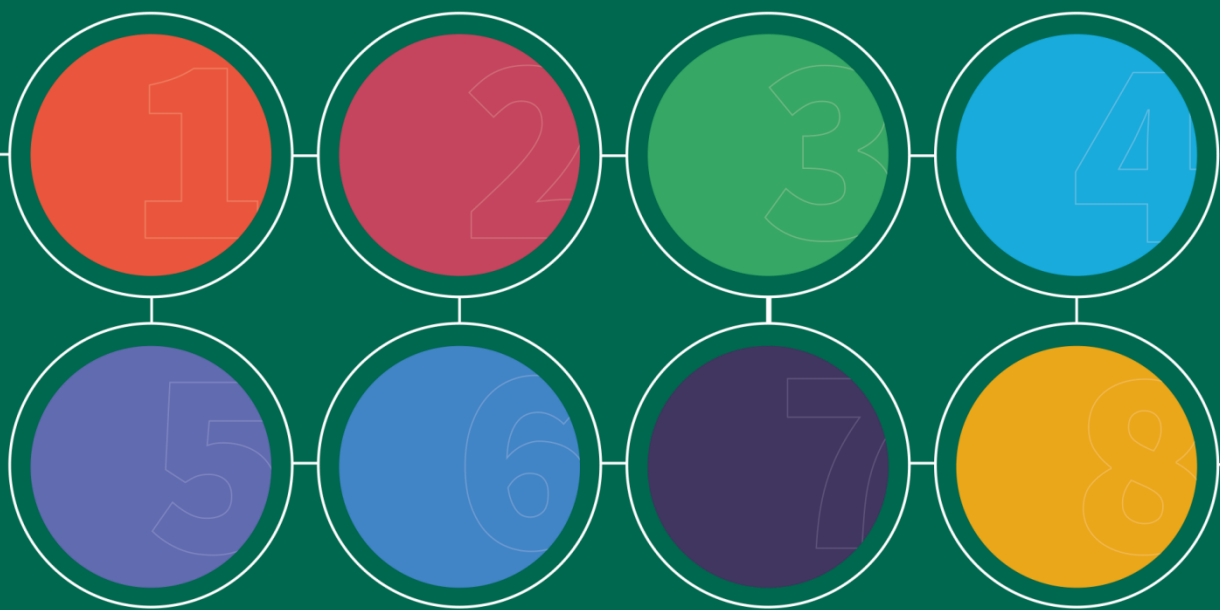


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# Finance and Property Services Management Plan 2022/23



# 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 2022/23

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, Financial Management, Property Services, 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 year.



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 2022/23

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 year 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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<b>Anti-Poverty Service</b>	11
<b>Audit, Risk and Counter Fraud Unit</b>	21
<b>Financial Management Unit</b>	26
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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)	2021/22 Performance	2022/23 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	Task Force meeting regularly and reporting to CPP Board  Integrating new reporting requirements into remit	Virtual meetings to continue quarterly to develop and deliver Covid-recovery action plan
		◆ 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.			
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.	Panel members meeting on a bi-monthly basis – change to virtual and emails due to Covid restrictions	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)	2021/22 Performance	2022/23 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	14 days	14 days
			APS068_Number of days to process new Council Tax reduction claims	14 days	14 days
			APS072_Scottish Welfare Fund spend against budget	100%	100%
			APS054_Discretionary Housing Payment spend against budget	100%	100%
			APS076_Percentage of eligible tenants receiving a Discretionary Housing Payment to mitigate the impact of the “bedroom tax”	100%	100%
Financial planning	(E1.1) Delivery of the revenue plan for 2022/23 that will enable the council to deliver the Corporate Plan.	◆ Preparing the revenue budget for 2022/23.	FM003_Revenue Budget Approval Within Set Deadlines	100%	100%
			◆ Joint working approach with Transformation Team to review and monitor delivery of 2022/23 savings	FM091_Budget Strategy and Planning Compliance with Timescales for Reporting	100%

Alignment with Corporate Priorities / Enablers					
Council priority / enabler	Deliverable	Finance and Property Services key activity / process	Indicator(s)	2021/22 Performance	2022/23 Target
Financial planning	(E1.2) Monitoring progress towards delivery of the 2022/23 revenue budget, taking account of the financial implications of Covid-19.	<ul style="list-style-type: none"> <li>◆ Regular financial monitoring of the delivery of the 2022/23 revenue budget and approved savings.</li> <li>◆ Regular monitoring of 2022/23 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 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 2022/23 capital budget and the overall long-term capital plan to 2027/28 within available resources and taking account of any financial implications arising from Covid-19.	<ul style="list-style-type: none"> <li>◆ Co-ordinating the financial monitoring of the 2022/23 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)	2021/22 Performance	2022/23 Target
Financial planning	(E1.4) Developing a corporate asset management strategy that supports effective management of assets.	◆ Delivery of asset management strategy through capital programme delivery.	FM091_Budget Strategy and Planning – Compliance within Timescales for Formal Reporting	100%	100%
		◆ Property Services 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.	Corporate Asset Management Strategy (CAMS) agreed by Council with actions defined by officers. CAMS establishes corporate priorities for all asset categories, these are: <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.	◆ To enable the council to effectively manage risk, reducing its cost and impact, and ensure the delivery of essential services.	P:IA021_Percentage of risks subject to annual documented risk assessment in Pentana	100%	100%



# Finance and Property Services Management Plan 2022/23

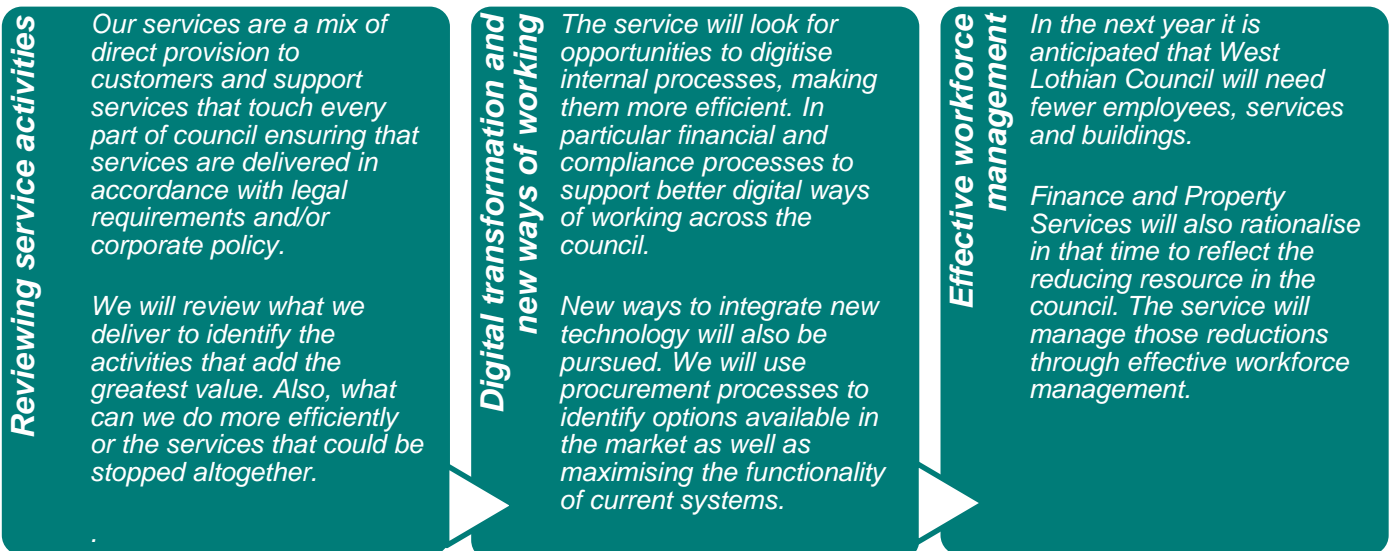
## Transforming Your Council

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 £9 million of savings in 2022/23. Over the five year period to 2022/23 transformation has fundamentally changed the way many 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 2022/23 budget savings of £511,000 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:

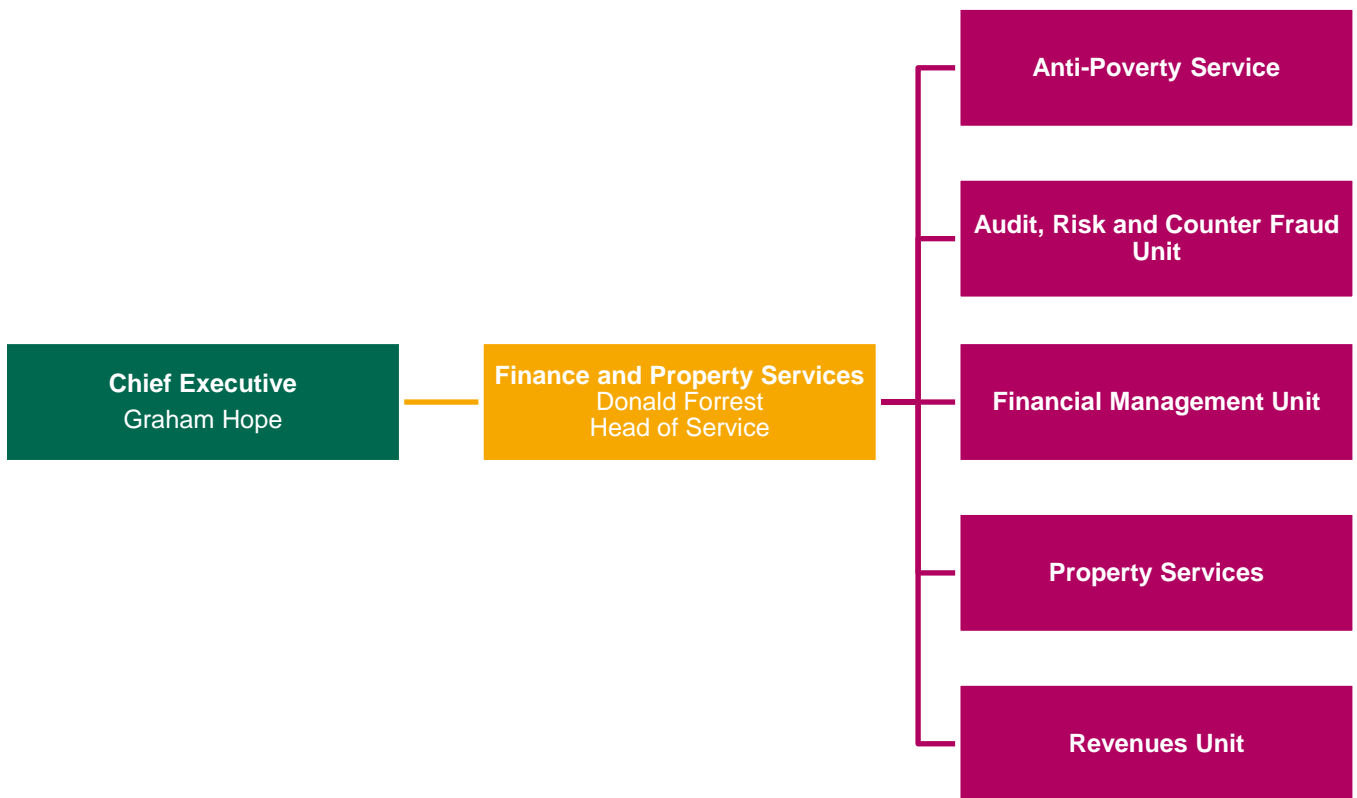
- ◆ We will involve and engage employees, customers and partners in service improvement and transformation activity through a range of appropriate methods.
- ◆ We will ask customers about the quality and effectiveness of the services that we provide through regular consultation and surveys using their 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 five 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 246.02 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>	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

During the pandemic there have been informal meetings in various formats with staff to ensure inclusion and also to promote and support the Employee Health & Wellbeing framework





## 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' four highest risks are as follows:

Service Risks 2022/23			
Risk Title	Risk Description	Current Risk Score	Traffic Light Icon
WLC026 Failure to prepare and agree an effective medium term financial plan 2023/24 to 2027/28	Failure to prepare and agree an effective medium term West Lothian Council financial plan including a balanced budget, could lead to unplanned service reductions, a failure to deliver key services, reputational damage, and industrial action.	20	
PS002 Capital programme additional costs and timescales	The combined impact of EU Exit and Covid-19 leading to supply chain constraints and increases in the price of building materials. Resulting in increases in construction costs and therefore additional costs in relation to the capital programme. This may also increase timescales for delivery.	20	
APS007 Failure to achieve the child poverty outcome of the Anti-Poverty Strategy	Failure to effectively co-ordinate activities with national government or community planning partners may lead to failure to deliver the strategy and achieve the agreed outcomes. Scottish Government has set a target to eradicate child poverty by 2030. An interim target has been set for 2023 to reduce relative child poverty to 18%.	16	
WLC029 West Lothian Leisure - failure to prepare and agree an effective medium term financial plan 2023/24 to 2027/28	Failure by WLL to prepare and agree an effective medium term financial plan including a balanced budget could lead to unplanned WLL service reductions, failure to deliver key services, and additional demands on WLC resources. There could also be a reputational risk to the council.	16	

## Anti-Poverty Service

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**Service manager:** Nahid Hanif

**Number of staff:** 71.94 (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 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 focusses on Covid-19 recovery to support low income households impacted by the pandemic, 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 embed the West Lothian Food Network and food poverty action plan into local support mechanisms.
- ◆ Working with partners to automate School Clothing Grants and providing a customer focused service for parent/pupil benefit applications for free school meals and Education Maintenance Allowance.
- ◆ 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 continued welfare reforms and changes including the on-going development 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.
- ◆ Working towards the renewal of the Scottish National Information and Advice Provider standard which is administered by the Scottish Legal Aid Board.
- ◆ Extend the use of Hybrid mail solution to all of the Anti-Poverty Service.
- ◆ Delivering financial support to Ukrainian refugees and hosts VIA the Sponsor Schemes
- ◆ Working in partnership with council services and third sector partners to maximise income and opportunities for Ukrainian guests

## 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, West Lothian Food 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, NHS Lothian, 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 2022/23</b>				
Customer Group	Method	Frequency	Responsible Officer	Feedback Method
<b>Anti-Poverty Service customers</b>	Satisfaction survey of 30 customers per week	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>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	Regularly	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>Volunteers</b>	Electronic survey/Focus Group	Annually	Financial Inclusion manager	Management Team Meetings

## Activity Budget 2022/23

Anti-Poverty Service – Activity Budget 2022/23								
Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £
<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 £12	Public	16.10	2,741,674	(611,424)	2,130,250
			APS060_Total quarterly amount the Anti-Poverty Service has gained for its customers Target £6 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 £12	Public	6.40	881,252	(196,529)	684,723
			APS064_Total value of energy advice savings - Target £400,000 per annum	High Level				

**Anti-Poverty Service – Activity Budget 2022/23**

Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £
<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 £12	Public	9.00	1,370,837	(305,712)	1,065,125
			APS061_Anti-Poverty Service Money Advice - Customer debt managed through money advice intervention - Target £1 million per quarter	High Level				
			APS063_Housing advice - number of evictions prevented - Target 15 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	18.6	3,384,737	(742,443)	2,586,733
			APS078 - Average number of days to process new housing benefit claims - Target 14 days.	Public				



**Anti-Poverty Service – Activity Budget 2022/23**

Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £
<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	WLAM	6.0	1,429,345	0	1429,345
			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	WLAM	5.58	2,610,501	(131,019)	2,479,482
<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 - £24	WLAM	4.48	293,751	(65,510)	228,241
			APS019 Percentage of Blue Badge applications - 75% within 28 days	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	APS101 Non Residential Care Charge Financial Assessments – Target 90%	WLAM	5.78	587,501	(131,019)	456,482

**Anti-Poverty Service – Activity Budget 2022/23**

Activity Name and Description	Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £
<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				
<b>Total:</b>				71.94	13,299,598	(2,183,656)	11,115,942

**Actions 2022/23**

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

<b>Anti-Poverty Service Actions 2022/23</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 reflecting on the consequences of covid pandemic.	An effective strategy that will ensure council and community planning partners work collaboratively to 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 reflecting on the consequences of covid pandemic.	Anti-Poverty Manager	April 2022	March 2023	Active	A strategic action plan and scorecard have been agreed and an annual action plan developed to support achievement of outcomes and reflecting upon these as a consequence of the covid pandemic. Local Child Poverty Action Plan agreed December 2020. Local Food Action Plan agreed and incorporated within the main action plan.
<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 embed money advice to increase financial inclusion.	Anti-Poverty Manager	April 2022	March 2023	Active	Lending severely affected by Covid-19. Discussions Pan council on final year of the project and exit strategy to be completed by June 2023.
<b>Non Residential Contributions Policy</b>	Development, implementation and ongoing 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 2022	March 2023	Active	Work ongoing to develop new software to support financial assessment and recovery of debt. This was delayed due to impact of Covid on resources and will be completed this year

**Anti-Poverty Service Actions 2022/23**

Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Blue Badges/National Entitlement Card</b>	Improve automation of entitlement schemes to make it easier to apply.	Entitlement schemes are supported and administered efficiently and effectively	Anti-Poverty Manager	April 2022	March 2023	Active	Project underway with Improvement Service to extend digitisation of NEC including the roll out of the under 22 Card.
<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 2022	March 2023	Active	Project underway to utilise robots to undertake processing activity to streamline and simplify automation.
<b>Volunteering</b>	Development of a West Lothian Council Volunteering Policy and strategy.	Improve the number of people choosing to volunteer with the council and co-ordinate activity across service areas.	Anti-Poverty Manager	April 2022	March 2023	Active	Anti-Poverty Service achieved Investing In Volunteer standard. Working Group set up to develop volunteering strategy
<b>Food Insecurity</b>	Embed West Lothian Food Network into support services.	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	April 2022	March 2023	Active	West Lothian Food Bank moved to larger premises to better facilitate the work of the Food Network. Food Network received funding for 2021/22 and 2022/23 to embed Food with Dignity principles with 39 community providers.
<b>Improving the Cancer Journey</b>	Embed processes to facilitate access to services for those diagnosed with cancer	Those affected by cancer are better able to manage the non-clinical aspects of their illness	Financial Inclusion Manager	April 2022	March 2023	Active	Staff in place and working effectively on the pan Lothian project

**Anti-Poverty Service Actions 2022/23**

Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>COVID Recovery</b>	Development of short term projects to support low income households who are in crisis	Improve access to income maximisation and money advice services within schools, GP surgeries and food providers. Provide grants to households who are in danger of fuel poverty, and provide financial support to those who are feeling the pinch and do not qualify for any benefits. Process one-off payments to specific groups of households adversely impacted.	Financial Inclusion Manager	April 2022	March 2023	Active	Recruitment commenced in January 2022 to enable projects to start as soon as possible.

## 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) 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 2022/23

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 point of contact</b>	Electronic survey	On completion of audit	Senior Auditor	Questionnaire results published on intranet.
<b>Investigation point of contact</b>	Electronic survey	Annually	Senior Counter Fraud & Compliance Officer	Questionnaire results published on intranet.
<b>Senior Managers</b>	Electronic survey	Annually	Senior Auditor	Questionnaire results published on intranet.

## Activity Budget 2022/23

Audit, Risk and Counter Fraud Unit Activity Budget 2022/23								
Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £
<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	168,811	(2,080)	166,731
			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 £390	High Level	3.0	168,811	(2,080)	166,731
			IA040_Average length of time (in weeks) to issue draft fraud reports - Target 14 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	54,962	(677)	54,285



**Audit, Risk and Counter Fraud Unit Activity Budget 2022/23**

Activity Name and Description	Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £
<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			
<b>Total:</b>				7.0	392,584	(4,837)	387,747

**Actions 2022/23**

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 2022/23</b>							
Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Public Sector Internal Audit Standards (PSIAS)</b>	External review of internal audit compliance with Public Sector Internal Audit Standards (PSIAS).	Compliance with PSIAS.	Kenneth Ribbons	June 2021	June 2022	Active	There is a requirement for an external review of compliance with the PSIAS to be undertaken once every five years. This is currently in progress and the outcome of the review will be reported to the Audit Committee.
<b>Counter Fraud E-Learning</b>	Roll out of compulsory anti-money laundering e-learning to staff.	Effective counter fraud arrangements.	Kenneth Ribbons	April 2022	June 2022	Planned	Training is required to ensure compliance with the council's Anti Money Laundering Policy.
<b>Risk management and business continuity guidance</b>	Review of risk management and business continuity guidance.	Effective risk management and business continuity arrangements.	Kenneth Ribbons	December 2022	March 2022	Planned	Annual review of the procedures as required by the Risk Management Strategy.

## Financial Management Unit

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**Manager:** Patrick Welsh, Corporate Finance Manager

**Number of Staff:** 38.30 (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 2022/23 a key aim of FMU is to continue to support and enable council services to deliver the agreed revenue and capital budgets for 2022/23 within approved budgets taking account of ongoing financial implications arising from Covid-19.

In addition, FMU will coordinate the development of a five year revenue budget plan for 2023/24 to 2027/28, which will set out how the council's Corporate Plan priorities will be delivered against the backdrop of an extremely challenging financial climate.

### 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 2022/23

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 published on Intranet

**Activity Budget 2022/23**

<b>Financial Management Unit Activity Budget 2022/23</b>								
Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £
<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 £2,500	High Level	6.60	443,361	(85,044)	358,316
			CP:FM003_Annual revenue budget approval within set deadlines - Target 100%	WLAM				
			FINSUS2 Uncommitted General Fund Balance as a percentage of council annual budgeted net revenue – Target 20.6%	WLAM				
			FINSUS3 Ratio of Financing Costs to Net Revenue Stream - General Fund– Target 6.7%	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 £2,500	High Level	14.60	1,017,121	(195,101)	822,020
			FM014_Budget monitoring - compliance with timescales for formal reporting – Target 100%	WLAM				

**Financial Management Unit Activity Budget 2022/23**

Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £
<b>Final Accounts</b>	Preparation of Final Accounts with the aim of securing an unqualified audit certificate.	Enabler service – Corporate Governance and Risk	FINSUS5 Actual outturn as a percentage of budgeted expenditure – Target 100% FM021_Cost of providing a financial management function per £1 million of council revenue budget - Target £2,500	WLAM High Level	3.60	234,720	(45,023)	189,697
<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% FM097_Average cost of servicing loans fund advances in year, interest & expenses - Target 4.5%	High Level High Level	1.30	78,240	(15,008)	63,232
<b>Systems support and records management</b>	Maintain and manage the Financial Ledger and Financial Records.	Enabler service – Corporate Governance and Risk	FM070_Treasury Management - investment rate of return – Target 0.14% FM021_Cost of providing a financial management function per £1 million of council revenue budget - Target £2,500	High Level High Level	3.40	234,720	(45,023)	189,697

## Financial Management Unit Activity Budget 2022/23

Activity Name and Description	Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £	
		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	6.20	443,360	(85,044)	358,316
			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	2.20	156,480	(30,015)	126,465
<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	10,590		10,590
<b>Total:</b>					<b>38.30</b>	<b>2,618,592</b>	<b>(500,258)</b>	<b>2,118,334</b>

**Actions 2022/23**

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

<b>Financial Management Unit Actions 2022/23</b>							
Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Revenue Budget Strategy</b>	Development and approval of the council's revenue budget strategy for 2023/24 to 2027/28	A five year revenue budget plan will be approved including detailed .3 year budget covering the period 2023/24 to 2025/26, which will enable the council to meet its Corporate Plan priorities.	Head of Service	April 2022	March 2023	Active	Initial financial scenario planning for 2023/24 to 2027/28 undertaken and reported to Council Executive. Ongoing development and update of assumptions progressing.
<b>Capital Budget Strategy</b>	Development, and approval of updated capital programme and budget strategy for 2023/24 to 2032/33.	An updated ten year capital programme and long term approach to asset investment and planning will be agreed.	Head of Service	April 2022	March 2023	Active	Development of capital funding and investment assumptions for ten year period is progressing.
<b>Health and Social Care Finance</b>	Development of integrated financial management and planning taking account of outcome of National Care Service Consultation	Effective joint working arrangements in place across council, NHS Lothian and IJB to aid implementation of National Care Service.	Corporate Finance Manager / IJB S95 Officer	April 2022	March 2023	Active	Outcome of National Care Service Consultation and legislative process during 2022.



## Property Services

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**Manager:** David Baird

**Number of Staff:** 74.66 (full time equivalents)

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

### Purpose

Property Services is responsible for the management and operational availability of the council's operational, corporate and commercial property assets. It provides services to both internal and external customers which include providing strategic direction on the management of the council's property assets, property compliance, asbestos, legionella and fire safety, property maintenance and planned improvements (including the significant summer programme). The unit is responsible for the prioritising and deploying of substantial capital and revenue resources to sustain and improve the council's property asset performance, and leads on the delivery of property investment programmes, projects and modernisation initiatives. The management of energy and the council's carbon commitment obligation, together with providing the facilities management of the council's corporate administration buildings and partnership centres, are also important elements of the unit workload. 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. Support services through the provision of professional and technical property services and includes statutory valuations, options appraisals and feasibility studies, acquisitions, disposals, property transaction negotiations, development advice, project feasibility, risk assessments and premises management advice and advocacy, business case development, project management, contract management, commercial property intelligence and advocacy, and managing community asset transfers. The unit is also responsible for the management of the council's Public Private Partnership (PPP) contracts.

Key challenges in 2022/23 include continuing to meet the service delivery during the coronavirus pandemic whilst preserving and enhancing the delivery of 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, policies, programmes and projects.

### Activities

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

- ◆ 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 and delivery of the Property Capital Programme, including project delivery by external and internal professional teams for both property and other assets (i.e. housing and open space). This includes planned improvements (i.e. summer schools programme, statutory compliance), developer and core funded projects. Total projects are projected to have a value of over £61m.
- ◆ Ensuring through effective management of statutory compliance, condition and systems that there are safe useable environments in all council premises.
- ◆ Management of significant revenue resources in excess of £24.75m deployed in the management, maintenance and operational availability of all council owned, leased and occupied property (i.e. energy, maintenance, non-domestic rates).
- ◆ Management of the council's tenanted non-residential property portfolio (TNRP).

- ◆ Professional and technical services including disposals, acquisitions, statutory valuations, business case development, property ownership records and property advice.
- ◆ Construction, Design and Development professional and technical support including statutory compliance policy and procedure development and support, options appraisals, feasibility studies, condition surveys and maintenance assessments, responsible persons advocacy and support and design services.
- ◆ 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 internal and external customers. All services within the council are partners through the property accommodation they occupy and use for service delivery. Our key external partners include; NHS Lothian and the West Lothian Integrated Joint Board, Police Scotland, Hub South East, Scottish Court Services, Scottish Procurement Alliance (SPA), Scottish Futures Trust and a wide range of other public, private and third sector organisations.

## 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 2022/23

Customer Group	Method	Frequency	Responsible Officer	Feedback Method
<b>Heads of Service &amp; Senior Responsible Officers</b>	Engagement and Board meetings	Monthly	Property Services Manager	Action Note of meetings.
<b>Customers who have requested repairs through the Property Helpdesk</b>	Electronic survey	Monthly	Team Principal	Results are posted on the intranet.
<b>Civic Centre and Partnership Centre's user groups</b>	Meetings	Quarterly	Group Facilities Manager	Minutes of meetings.
<b>Customers and Service leads before and 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 – 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>Commercial tenants and occupiers of Corporate buildings</b>	Electronic survey	Biennially	Commercial Property Surveyor	Results posted on the internet and/or posted to respondents.

## Activity Budget 2022/23

Property Services Activity Budget 2022/23								
Activity Name and Description	Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £	
<b>Strategic Property Asset Management</b>	The efficient and effective management of the council's operational properties.	Enabler Service - Modernisation and Improvement	PS113_Cost of providing the service (per £1 million). Target £34,250	WLAM	2.50	0	(903,273)	
			SCORPASSET02_Proportion of Internal Floor Area of Operational Properties in Satisfactory Condition - Target 99.4%	Public				
<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:PS803_Percentage of Properties with a Fire Safety Risk Assessment (FSRA) updated within the last five years - Target 100%	Public	17.70	961,398	(974,059)	
			PS812_Percentage of Operational Properties with an Asbestos Register - Target 100%	WLAM				
			PS803_Percentage of Properties with a Fire Safety Risk Assessment (FSRA) updated within the last five years - Target 100%	High Level				
<b>Cyclical Maintenance</b>	Management of the council's 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: Target 99.4%	Public	0.40	372,718	(122,755)	
							249,963	

**Property Services Activity Budget 2022/23**

Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £
<b>Reactive Maintenance</b>	Management of the council's 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 Target 99.4%	Public	0.10	99,392	(32,733)	66,659
<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:PS207_Percentage of Total Capital Programme Spend Delivered in Year by Property Services Target 100%	Public	19.96	1,098,741	(1,113,210)	(14,469)
			PS204_Percentage of projects delivered on time (GS property) - Target 100%	WLAM				
			PS201_Percentage of projects delivered on time (GS Open Space) - Target 100%	WLAM				
<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	PS113_Cost of providing the service (per £1 million) Target £34,250	WLAM	5.0	4,522,326	(1,489,431)	3,032,895
			P:PS304_Percentage of rent outstanding for Commercial Property, (Current debt) Target 4%	Public				

**Property Services Activity Budget 2022/23**

Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £
<b>Professional services</b>	Including: Valuation for capital accounting purposes; maintenance; granting property rights; provision of expert advice; (including land ownership) development of land and buildings for economic development purposes and provision of advice to migrant and growing businesses.	Enabler service – Financial Planning	PS603_Percentage of customers rating the service delivery of maintenance as good or excellent Target 90%	Public	4.20	3,801,735	(1,252,104)	2,549,631
			P308 _Asset valuations completed within agreed timescales Target 100%	WLAM				
<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	PS113_Cost of providing the service (per £1 million) Target £34,250	WLAM	1.50	1,366,637	(450,103)	916,534
<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:PS207_Percentage of Total Capital Programme Spend Delivered in Year by Property Services Target 100%	Public	4.00	228,905	(231,919)	(3,014)
			PS206_Percentage of projects delivered on time (Housing) - 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	Enabler service – Financial Planning	P:PS901_Carbon emissions from energy used in buildings (Annually) Target 18,662 tonnes check	WLAM	3.00	5,629	0	5,629

**Property Services Activity Budget 2022/23**

Activity Name and Description	Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £
		P:PS906_Percentage completion of Energy Performance Certificates in operational buildings where required - Target 100%	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	PS401_Customer Satisfaction - Council Officers - Target 90% - Suspended during Covid	15.20	13,790,608	(4,541,946)	9,248,662
			SCORPASSET02 – Proportion of Internal Floor Area of Operational Buildings in Satisfactory Condition. Target 99.4%				
<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	PS113_Cost of providing the service (per £1 million) Target £34,250	1.00	894,526	(294,613)	599,913
			SCORPASSET02_ Proportion of Internal Floor Area of Operational Buildings in Satisfactory Condition: Target 99.4%				
<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	0.10	79,243		79,243
<b>Total:</b>				<b>74.66</b>	<b>27,221,858</b>	<b>(11,406,146)</b>	<b>15,815,712</b>

**Actions 2022/23**

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

<b>Property Services Actions 2022/23</b>							
Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Corporate Asset Management Strategy (2017/18 2027/28)</b>	Implementation and ongoing monitoring and reporting of the actions contained in the council's corporate asset management strategy and reflecting on the consequences of covid pandemic.	Effective delivery of the strategy reflecting the consequences of covid pandemic including a framework of performance measures for the management of all council assets.	Strategic Property Asset Manager	April 2022	March 2023	Active	Monitoring of actions and performance indicators in the Corporate Asset Management Strategy and reflecting upon these as a consequence of the covid pandemic.
<b>Property Asset Management Plan (2017/18 2027/28)</b>	Implementation, management, monitoring and reporting of the council's property asset management plan and its activities and reflecting on the consequences of covid pandemic.	An effective plan that delivers the actions and activities to ensure the effective and efficient management of the council's property assets reflecting the consequences of covid pandemic.	Strategic Property Asset Manager	April 2022	March 2023	Active	Monitoring of actions and performance indicators and reflecting upon these as a consequence of the covid pandemic..
<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 are 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 and reflecting on the consequences of covid pandemic.	Operational properties remain open and safe for use at all times reflecting the consequences of covid pandemic.	Statutory Compliance Team Leader	April 2022	March 2023	Active	Detailed programmes in place and reviews of policies in support of programmes (Asbestos, Fire Safety, Legionella) ongoing and reflecting upon these as a consequence of the covid pandemic..



**Property Services Actions 2022/23**

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 Property Asset Management IT software and storage systems. Streamlining for property information storage (i.e. sanserver)	To enable ongoing asset management of non-housing council buildings and streamline maintenance and compliance processes.	Strategic Property Asset Manager	April 2022	March 2023	Active	Repairs helpdesk in place and system implemented for all orders & invoicing. Asbestos module in development for implementation plan in 2022/23.
<b>Learning Estate Management Plan (2022/23-2031/32)</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.	Capital Programme and Projects Principal	April 2022	March 2023	Planned	The draft plan will proceed to Education PDSP and then to Council Executive for approval.
<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.	Capital Programme and Projects Principal	April 2022	March 2023	Active	Detailed management and monitoring arrangements in place.
<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.	Capital Programme and Projects Principal	April 2022	Mar 2023	Active	Investment projects programmes will be reported to the Council Executive and Education Executive as appropriate.
<b>Development, implementation, management, monitoring and delivery of property projects</b>	Management of projects & investment in support of the Property Capital Programme of investment.	Successful delivery of investment programme with improved council assets and accommodation which meets the needs of service users and supports efficiencies in service delivery.	Capital Programme and Projects Principal	April 2022	March 2023	Active	Detailed project briefs established with management and monitoring arrangements in place.

<b>Property Services Actions 2022/23</b>							
Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<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.	Capital Programme and Projects Principal	April 2022	March 2023	Active	Initial feasibilities undertaken and business cases developed. Beatlie ASN School agreed. East Calder being progressed. Riverside/Letham to be submitted.
<b>Climate Change Strategy, Energy Management and Carbon Management Plan (2021-2028)</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 & Climate Change Manager	April 2022	March 2023	Planned	Strategy approved and updates provided to Environment PDSP then Council Executive as appropriate.
<b>Commercial Property Strategy (2022/22- 2027/28)</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.	Commercial Portfolio Manager	April 2022	March 2023	Active	Strategy approved which reflects economic changes.

## Revenues Unit

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**Manager:** Scott Reid, Revenues Manager

**Number of Staff:** 54.12 (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 2022/23 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
- ◆ Housing Benefit Overpayments
- ◆ Income Management
- ◆ Liaising with other services to apply appropriate council tax discounts/exemptions to households as a result of Ukrainian refugees taking up residence

### 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, Sheriff Officers, 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 2022/23

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 2022/23

Revenues Unit Activity Budget 2022/23								
Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £
<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	21.02	861,510	(599,769)	261,741
			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 £60.00	WLAM	9.60	408,387	(284,101)	124,286
			REV009 - Cumulative value of Housing Benefit Overpayment recovered - Target £848,000	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	91,201	(63,134)	28,067
			REV002 - Percentage of Business Rates received in the year - Target 97%	WLAM				
<b>Service Accounts</b>	Collection of the council's service accounts.	Enabler service –	REV016 - Cost of collection for service accounts - Target £8.00	WLAM	2.0	91,201	(63,134)	28,067

**Revenues Unit Activity Budget 2022/23**

Activity Name and Description		Link to Corporate Plan	Performance Indicator and Target 2022/23	PI Category	Staff Resources (FTE)	Revenue Expenditure Budget 2022/23 £	Revenue Income Budget 2022/23 £	Net Revenue Budget 2022/23 £
		Financial Planning	REV083 - Outstanding service account debt over 12 months - Target £390,000	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 £500.00.	WLAM	13.50	566,980	(394,585)	172,395
			REV068 - Percentage of e-returns processed within 6 days - 99%	WLAM				
<b>Business Support</b>	Provision of a support function for all Unit teams.	Enabler Service - Financial Planning	REV111 - Cost of Business Support per £1 million of payments processed - £80.00.	WLAM	6.00	249,794	(173,617)	76,177
			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.					
<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	WLAM				
<b>Total:</b>					<b>54.12</b>	<b>2,269,072</b>	<b>(1,578,339)</b>	<b>690,733</b>

**Actions 2022/23**

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

<b>Revenues Unit Actions 2022/23</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	March 2023	Active	The online forms have now been identified for development. Initial meeting held with Digital Transformation Team regarding use of robotic automation to take this forward
<b>Service Redesign, Integration &amp; Modernisation projects</b>	Implementation and development of the Civica Recovery Matrix module providing real time Council Tax and Business Rates arrears data capture and analysis.	Reduce administrative delay in identifying, profiling and progressing actions on customer accounts with Council Tax and Business Rates arrears.	Revenues Manager	April 2022	March 2023	Active	Work has started on the implementation of the Civica Recovery Matrix module.
<b>Service Redesign, Integration &amp; Modernisation projects</b>	Review of processes relating to the profiling and administration of aged Council Tax debt.	A comprehensive set of updated processes and related actions are in place to deal effectively with aged debt cases in line with the principles of the Corporate Debt Policy.	Revenues Manager	April 2022	March 2023	Active	Preparatory analysis of aged debt is being progressed.

**Revenues Unit Actions 2022/23**

Action	Description	Planned Outcome	Owner(s)	Start	End	Status	Update
<b>Service Redesign, Integration &amp; Modernisation projects</b>	Review of processes and practices as a result of longer term legislative changes in sequestration and court actions as a result of Covid-19 pandemic.	Updated processes and practices are in place to effectively administer sequestration and court actions.	Revenues Manager	April 2022	March 2023	Planned	The Scottish Governments Coronavirus (Recovery and Reform) (Scotland) Bill sets out a revised amount of £5,000 (up from £3,000) of debt must be due before a qualified creditor can petition for a debtors sequestration. Work is being planned to review our processes and practices in relation to sequestration and potential alternative debt actions in light of this
<b>Service Redesign, Integration &amp; Modernisation projects</b>	Upgrade the Capita Income Management System to the current version to enable running on Chrome and Edge.	Version 13 of the Capita Income Management System in live operation with no reliance on Internet Explorer.	Revenues Manager	April 2022	September 2022	Active	A draft project plan is being developed for agreement and sign off.
<b>Service Redesign, Integration &amp; Modernisation projects</b>	Integration of the CSC Revenues Team into the structure of the Revenues Unit	The CSC Revenues Team has been successfully integrated into the structure of the Revenues Unit.	Revenues Manager	April 2022	September 2022	Planned	The joint trade unions and staff have been advised of the integration of the CSC Revenues Team into the structure of the Revenues Unit. Work is being planned to ensure a smooth transition.



# 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 year.

## Context

The next year 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:

- ◆ Ongoing implications operationally and financially of Covid-19
- ◆ 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

## 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.




<b>Corporate Plan</b>	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
<b>Finance and Property Services Planning</b>	The service management team develop the plan taking account of a range of factors, business requirements and customer needs.	February to March 2022
<b>Executive Management Team approval</b>	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 2022
<b>PDSP consultation</b>	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.	10 June 2022
<b>Management Plan launch</b>	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 2022
<b>WLC website</b>	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 2022
<b>Management Plan updates</b>	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: 2021/22 performance exceeded the target =  / 2021/22 performance met the target =  / 2021/22 performance was below the target = ):

Indicators					
WLAM unit / service	PI Code and Short Name	2021/22 Performance	2021/22 Target	Performance against Target	2022/23 Target
<b>Anti-Poverty Service</b>	APS007_ Percentage of customers who rated the overall quality of the service as good or excellent	95%	95%		95%
	APS017_ Total number of complaints received by the Anti-Poverty Service	20	20		20
	APS055_ Unit cost of Advice Shop customer enquiries	£12	£12		£12
	APS074_ Total annual amount the Anti-Poverty Service has gained in extra benefits for its customers	£28,000,000	£28,000,000		£24,000,000
<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	£430	£460		£430
	P:IA014_ Percentage of audits in the annual audit plan completed for the year	90%	100%		100%
<b>Financial Management Unit</b>	FM082_ Percentage of customers who rated the overall quality of the service as good or excellent.	100%	95%		95%
	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	£2,300	£2,500		£2,500
	FM091_ Budget Strategy & Planning – Compliance with Timescales for Reporting	100%	100%		100%

<b>Indicators</b>						
WLAM unit / service	PI Code and Short Name	2021/22 Performance	2021/22 Target	Performance against Target	2022/23 Target	
<b>Property Services</b>	PS603_ Percentage of customers rating the service delivery of maintenance as good or excellent	94.6%	90%		90%	
	PS104 Total number of complaints received by Property Services	17	20		20	
	PS113_Total/unit cost of providing service per £1 million of council revenue budget	£51,344	£49,000		£52,000	
	P:PS304_Percentage of rent outstanding for commercial property	4.72%	4%		4%	
	P:PS207_Percentage of Total Capital Programme Spend Delivered in Year by Property Services	125%	100%		100%	
<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%	90%		91%	
	REV122_Total number of complaints received by Revenues Unit	70	100		100	
	SCorp04_Cost of Council Tax collection per dwelling	£5.40	£5.00		£5.00	
	SCorp07_Percentage of Income due from Council Tax Received by the End of the Year	96.1%	96.5%		96.5%	

This scorecard offers a high level snapshot of the service performance. More information about the performance of Finance and Property 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 2022/23

**April 2022**

For more information:

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