

Full Council Meeting – 6 December 2022

Portfolio Holder Report for Communications and Corporate Resources.

I am pleased to present this report, which shows Somerset West and Taunton holding up well under difficult circumstances – a very effective council continuing to provide support and development for the district. I am very grateful for the leadership shown by senior staff and the continuing effort at all levels to keep the ship afloat and sailing smoothly. While we prepare to merge with our neighbours into Somerset Council, we have also created a Town Council for Taunton, got our finances in good order, and taken effective action to provide a responsive service to the people of Somerset West and Taunton.

CORPORATE SERVICES

Please find below the relevant updates relating to each of the Corporate Teams providing the main support functions to the council.

HR Team Update

Recruitment

During the last quarter, SWT budget was for 637.42 full-time equivalent (FTE) staff. The actual average for the period was 602 FTE with 79 FTE vacancies.

Of those vacancies many are covered by agency or contract staff in anticipation of LGR.

| Month | Starters | Leavers | Turnover |
|-----------|----------|---------|----------|
| July | 4 | 7 | 1.16% |
| August | 6 | 6 | 1.00% |
| September | 5 | 6 | 1.00% |

Sickness Absence

The level of reported sickness absence during the quarter was 5.83% compared to 3.24% in the previous quarter:

Personal and work-related stress continues to account for the largest amount of absence, making up 16.19% of all sickness (a 0.98% rise from the previous quarter) closely followed by Covid at 11.70%.

Following sessions with MIND, Wellness action plans have been rolled out and we have re-engaged MIND for further support.

Service Development - People, Projects & Key Achievements

- Not surprisingly the main focus for the team is on work supporting LGR. With members of the HR team engaged in all the key people workstreams. This includes TUPE, Tier 2 and 3 consultation and appointments, managing the consultation machinery with our Trade Unions, Policy Development, Equalities, Payroll Transfer, single Learning Management System etc

Organisational Development & Learning Update

Current Focus

- Training requests are being processed on a weekly basis to speed up applications and we have introduced an Assistant Director Panel to support decision-making, the apprenticeship levy is being utilised wherever possible

and we are promoting any low-cost or free training that we are aware of through our partner organisations.

- Two new e-learning modules launched: Health & Safety Policy and Anti-Terrorism.
- Additional in-house training packs are being developed, aimed primarily at managers.

New Projects

- We are working on agreed plans and messaging for the autumn to support our people and the organisation to navigate through increases in COVID cases and the cost-of-living crisis.
- All members of the team are involved in various People LGR workstreams. Key areas of focus coming up are the Dynamic Working Strategy, cultural workshops and culture navigators, LMS system migration, and manager and employee change support, T2/3 consultation and recruitment support.

Key Achievements

- 50 managers completed the Leadership Development Programme.
- Significantly improved data reporting for learning and development. Now closer working with Health & Safety Team to continue to improve this data and ensure it is utilised effectively.
- Significant improvement in percentage completion of mandatory corporate e-learning modules.

ICT Team Update

Infrastructure Team

Primary focus of ICT has been supporting the various LGR sub-workstreams, especially the move to a single platform scheduled for Jan 2023.

Annual IT Health check has recently been carried and remediation work is underway to resolve any issues identified.

Service Desk Team

Mainly focusing on BAU tasks and working on the laptop refresh project.

Applications Team

- Housing system support
- MS Dynamics workstream
- Removing legacy systems in readiness for the move to the single platform

Governance Team Update

- Work continues to balance the pressures of staff retention (against LGR and SCC opportunities), continued commitment to supporting the committee cycle, LGR workstreams and working towards the implementation phase of the CGR project.
- The Taunton Shadow Town Council has been set up and the first meeting took place on 3rd November and will take place monthly.
- The Elections Team are finishing off the Annual Canvass, with the Electoral Register to be published in December 2022.
- A review of Polling Stations and Polling Places has been published for consultation before going before Council for approval in December.
- The Elections Team are preparing for the Taunton Town Council elections in May 2023, which will include the introduction of voter identification at polling stations.
- The team are also working on member safety initiatives alongside H&S team.

Change & Digital Team Update

Current projects and achievements

Single Platform Cut Over

- SWT will be moving across to the Somerset Council IT environment over a weekend in January – 5pm Thursday 19th to 8am Monday 23rd. This will require a full IT outage to enable user accounts, devices and data to be migrated. A project team is set up and working closely with the LGR programme and IT Teams to ensure a smooth transition for staff and Members. A full briefing for Members is taking place Thursday 17th November at 6pm.

Academy Replacement Project

- Since going live the project team have continued to support the business with their learning and knowledge development of OPENHousing, providing further training and user guides.
- Work continues on the implementation for the additional modules (Tenant Portal, SMS, PCOL and TotalMobile)

Assure Health & Safety System

- The Incident module is live and enables operational staff performing high risk activities to log accidents, incidents and near misses via a mobile app for the Health & Safety Team and managers to review/action. Work on the Risk and Contractor modules is progressing well.

Information Management Team Update

- Information Management Member's briefing completed on 1st November and follow up actions underway
- Paper Records Project – store management system and process under LGR is being adopted and implementation/on boarding has started
- Retention and Disposal Schedule – work to align all schedules under LGR is progressing, SWT leading from a district perspective
- Work continuing under LGR Information Governance and Records Management sub workstreams
- SWAP Records Management audit (across all 5 Councils) in progress

Business Analyst Team Update

Throughout the last 3 months the Business Analysis team have taken the lead and supported the delivery of the following solutions:

- Customer Experience programme including Website improvements, general inquiry analysis, data analysis of calls and review of gas and electrical compliance processes
- LGR project, change of circumstances workshops held with Sedgemoor District Council
- LGR project, revenues and benefits processes
- Conversion of PDF forms on the website to Firmstep forms for planning and street naming and numbering
- Upgraded repairs online tool
- Upgraded new supplier process

Health & Safety Team Update

- During the period between reports the H&S Lead for the organisation has officially departed and the team is currently being lead by Sean Papworth & Dan Webb.

- The work to complete the Health & Safety Improvement programme continues with most workstreams nearing an end. The follow up Audit from SWAP indicated vast improvements in all areas and we will review closing the programme in due course.
- The Assure H&S system has been launched with the incident module being released. A few incidents have now been tracked fully using the system. The next module to be released will be 'Risk' which will give operatives the capability to complete dynamic risk assessments in the field.
- We continue to work alongside SCC and district partners to develop the SC H&S sub workstream products.

Business Intelligence Team update

Recent achievements:

- Q1 performance report taken to Executive and Scrutiny, and Q2 performance report written.
- Ongoing work to support a number of LGR workstreams including Corporate Performance, Business Intelligence, PMO and Risk Management.
- Developed new user-friendly risk management tool.

Priorities for coming period:

- Continue to support LGR process especially regarding:
- the work to produce a single gazetteer and address record (Local Land and Property Gazetteer) for the whole of Somerset.
- the BI requirements for the new Dynamics finance system
- a new tool to provide a climate change risk and impact assessment toolkit utilising powerapps and Power BI.
- Continue to provide spatial data and Geographical Information Systems support for the Taunton Community Governance Review.

We also have one of the original Internal Operations programmes sitting within the team which I also wish to update on.

Service Improvement and Efficiency Programme Update

The current projects within the programme are;

- Revenues Enforcement Project – this project continues to deliver well above the initial forecast. The project has delivered an additional retained income of 371K over a 7-month period against a 12-month forecast of 367K.
- Excellence Framework Project – Individual team support continue to be provided on demand. The opportunity to deploy the tool across the new council will now be explored
- Change and Improvement Capabilities Project: A team of Excellence Champions continue to develop their expertise by working, organisation wide, on varying improvement opportunities. They now have the knowledge, as a group, to support teams towards excellence.

Customer Experience Improvement Project:

- Aims to improve customer experience by understanding and learning from their reasons for complaining.
- A customer complaint deep dive has provided an insight on the reasons for complains in select service areas and has led to multiple actions which are at varying stages of delivery (Ongoing housing process change, recruitment of a

dedicated complain case manager in Revs & Bens, complain answer training...) In Parallel, the complaint tool has been improved with the aim of capturing and monitoring the complaint causes providing a sustainable approach to learning from the customer complaints.

- This project also improves customer experience and efficiency by reducing the number of avoidable contacts thanks to better customer channelling. The website 'contact us' page has been re-designed to promote and ease self-service and reduce the number of unnecessary requests coming through calls or general enquiries. A how-to video is now available from the website home page and will soon be shared via socials. Early data are showing a 12% hit increase on the next web page which suggests that customers are finding the service they require and may then be using the online tools as opposed to calling.

FINANCE AND PROCUREMENT

As with my last report to Council, the finance and procurement service continues to work tirelessly maintaining our 'business as usual' services for Somerset West and Taunton as well as helping to take forward the huge effort required delivering preparations for the implementation of the new unitary authority in April.

One of our major milestones for this year has to all intents and purposes been completed – the finalisation and audit of the annual Statement of Accounts. Our external auditor, Grant Thornton LLP, presented the Audit Findings Report to the Audit and Governance Committee on 7 November, which indicates the auditor's conclusion that the accounts present a true and fair view of the Council's financial position and performance for 2021/22 financial year.

As such the auditor plans to issue an unqualified Opinion, which is good news, however this will be slightly delayed. The regulatory deadline for publishing the audited accounts is 30 November, which we will or would achieve subject to one issue affecting virtually all local authorities. The issue relates to the accounting treatment of infrastructure assets (such as footpaths, coastal defences, etc) which is awaiting a 'statutory override' to be issued (possibly in December) which may require minor disclosure adjustments. As such the Audit and Governance Committee has approved the 2021/22 accounts in principle and delegated authority to the Chair and S151 Officer to formally approve the accounts subject to any reporting changes required for this group of assets.

The Auditor also plans to issue his value for money conclusion through the Auditor's Annual Report to Audit and Governance Committee in December. At the time of writing this report to Council no adverse issues have been raised by the Auditor.

In terms of the current year's finances, the mid-year forecast against budget is reported to Community Scrutiny 30 November for the HRA and Corporate Scrutiny 7 December for the General Fund. Although the challenges and risks related to the economic situation remain significant, I am pleased to report that the projected outturn position has improved with the General Fund now projecting an underspend plus planned increases in general reserves, and with the HRA projected overspend reducing by around half compared to the Q1 forecast. This reflects the Council's

effective management of resources, and the details are set out in the respective reports.

Looking forward to next year, the County Council's Executive received a budget update report on 16 November which highlights the scale of the financial challenge for next year and the medium term. We are playing our part in supporting the budget challenge by holding a decent level of reserves that will transfer to the unitary council on 1 April and support its financial strategy for its first year and beyond.

The Government published its Autumn Statement 2022 on 17 November, setting out its fiscal plans. This is of extreme importance for the new Somerset Council for its 2023/24 budget and medium financial planning. Some of the headlines include:

- The Autumn Statement provides little detail about grant funding beyond stating that departmental budgets will be protected in cash terms in 2023-24 and 2024-25 and then will grow by 1% per year in real terms in the following three years.
- The Council Tax referendum limit will be 3% per year, with adult social care precept also able to be increased by 2% per year.
- There are several changes to the business rates regime, for example the multiplier will be frozen and support for eligible retail, hospitality, and leisure businesses is being extended and increased from 50% to 75% business rates relief up to £110,000 per business in 2023-24. From a funding perspective there is an explicit commitment that local authorities will be fully compensated for the loss of income because of all business rates measures announced in the Autumn Statement and will receive new burdens funding for administrative and IT costs.
- Rents for social housing will be capped at 7% in 2023-24. This is higher than the 5% cap on which the government consulted in the summer but is lower than the current arrangement for rents to rise by CPI +1%.

Overall, the Autumn Statement indicates that the combined impact of measures and latest inflation forecasts will mean budget gaps will continue to rise and place significant financial pressures for local authorities to manage, which will be extremely challenging.

CUSTOMER

All of the services within Customer continue to be heavily engaged with the preparation to transition to the new Somerset Council and are working within all of the six Local Government Review workstreams.

In addition, we continue to focus on maintaining 'business as usual' service delivery including, since the last Full Council update, the following:

- Ongoing administration of the 'thank you' payments to Ukrainian refugee hosts, which we are also administering on behalf of Mendip District Council.

- We had a dip in performance on Housing Benefits processing times earlier in the year due to resource constraints and system issues. These problems have been resolved and we are now processing within target again.
- Customer Services are continuing to receive high volumes of calls, but are taking actions to improve our ability to answer them. For example we have ring-fenced a number staff to focus on the repairs call handling service and, as a consequence, performance has dramatically improved. We are also working closely with the staff to improve the number of calls they are able to deal with on a daily basis.
- We are continuing to manage & monitor complaints across the authority as a whole and implementing further training. There are still response issues in some areas.
- Freedom of Information (FOI) response rates are now performing really well across the organisation as a whole and we are seeing performance well in excess of the target.
- Recovery activity for Council Tax & Business Rates has now recommenced (NB. we had to suspend activity for technical reasons during the Spring & Summer to enable us to make the Fuel Rebate payments). Collection rates remain on target.
- Work continues on the arrears enforcement project. To date this has resulted in our collecting in excess of £2m in Council Tax and Business Rate arrears for previous years, of which we retain circa £0.5m.
- A recent audit report of our Debtors function provided 'substantial assurance'. This represents a significant improvement given that two years ago the audit flagged a number of key risks and only provide a partial assurance.
- The Covid Additional Relief Fund (CARF) scheme payments have largely been completed, although we are still awaiting contact from a small number of qualifying businesses.
- Members of our Income Team have been heavily involved in the project to launch the new Open Housing system, which has now successfully gone live. We have subsequently completed the migration of all of the former tenant debts to the new system in order that all of these debts are held in the same place. The automated debt collection 'prompts' are now set up and working within the system.
- We are commencing planning for the annual year-end / new year billing processes for Council Tax, Business Rates, Benefits and Rents. This will include this year a revaluation of all business rate assessments, which requires us to undertake a fair amount of preparatory work that will commence in December.