

Report of	Meeting	Date
Chief Executive (Introduced by the Executive Member for Resources)	Overview and Scrutiny Performance Panel	Thursday, 23 November 2023

Business Plan Update 2023/244

Is this report confidential?	No
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Is this decision key?	No
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Purpose of the Report

1. To provide the Overview and Scrutiny Performance Panel with an update on the delivery of service level projects outlined in the business plans.

Recommendations to Scrutiny Committee

2. That the information contained within this report is discussed by the Overview and Scrutiny Panel with a view to review performance outlined in the business plans.

Reasons for recommendations

3. To ensure that the delivery of the service level projects is being effectively monitored, that progress is being sufficiently achieved, and that risk is being successfully addressed.

Other options considered and rejected

4. No other options have been considered or rejected. This is because the report does not present any key items for decision.

Corporate priorities

5. The report relates to the following corporate priorities:

Housing where residents can live well	A green and sustainable borough
An enterprising economy with vibrant local centres in urban and rural areas	Healthy, safe and engaged communities

Background to the report

6. Each year the council completes the business planning process where services identify the activity that they will deliver to support the achievement of the priorities set out in the

Corporate Strategy. The process includes engagement with staff and teams and results in the creation of service level business plans.

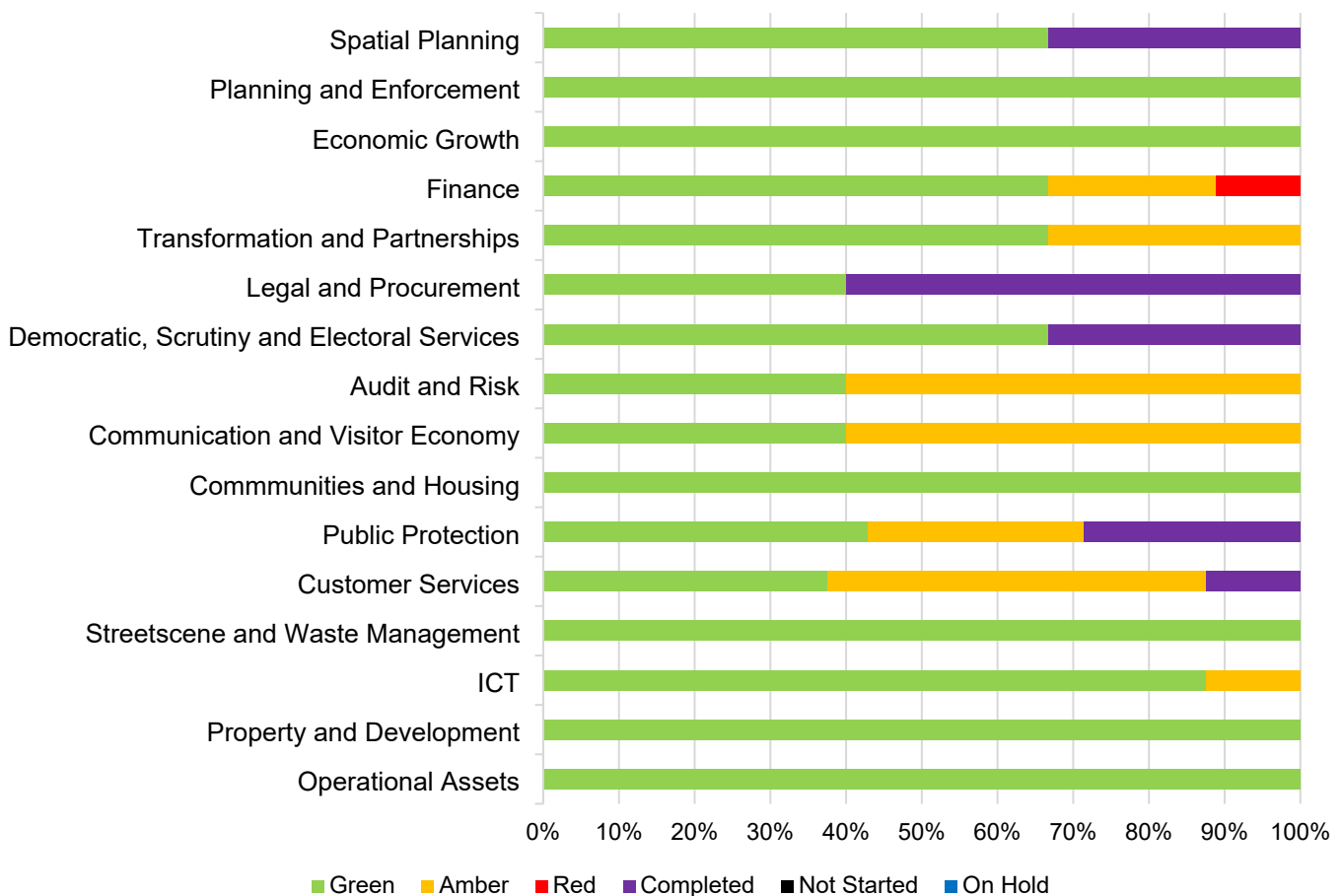
7. The business planning sessions were delivered in February 2023 with staff from across services, fostering staff engagement and utilising internal skills and experience in order to capture non business as usual actions.
8. Following this, all service level business plans were approved in June 2023. This paper gives an update on all the service level business plan projects for 2023/24 and outlines the progress of projects. It also sets out where projects are amber, red or on hold as well as actions being taken to get these projects back on track.

Summary of project delivery

9. A review of **16** business plans produced last year has been completed based on the information provided. The plans contain a total of 81 projects and of those:

- 54 are rated as **Green (67%)**
- 10 are considered **Completed (12%)**
- 16 are rated as **Amber (20%)**
- 1 is rated as **Red (1%)**

10. The graph below provides an overview status by service. There is a full list of projects and status by directorate at Appendix A.



11. For projects rated as amber or red, a table has been produced under the project focus outlining the reasons behind the rating and actions being taken to get the projects back on track.
12. The majority of projects across all services are rated Green. Most plans are due to be completed by the end of the year or March 2024. Longer term pieces of work will be delivered in phases and may extend to future years.

Highlights of work rated green or completed since the last update include:

- **Implement Civil Penalties Policy** has been approved at Executive Cabinet. This will allow the Council to serve a fixed penalty notice on private landlords who are not compliant with legislation to provide quality homes. The policy will help ensure that all landlords are providing good quality homes for residents and will act as a deterrent in the future for others who would otherwise have broken this.
- **Delivery of council elections in Chorley and South Ribble** were all successfully delivered this year and fully complete by the end of May 2023.
- **Member Induction** was effectively implemented to help the seven new Members settle into their new roles and included presentations/workshops, tours, shadowing, training, and an extensive handbook. The induction programme has been evaluated by the Member Support Working Group with positive feedback received.
- **Mod.gov move to cloud hosting** was efficiently and effectively delivered and has provided the council with greater resilience, allowing for more effective support, improved accessibility, and the ability to archive and review the information held in the system.
- **Delivery of new CCTV suite at Strawberry Fields and staff integration** is progressing well with a contract having been awarded. The new staff are also going to be onboarded a quarter early to make sure they are up to speed with processes once the project is complete. It is estimated that this will complete by April 2024.
- **Embedding the new team Structure (Finance)** Extensive training has been undertaken across the team on key areas including Collection Fund Accounting, National Non-domestic Rates (NNDR) returns, Value Added Tax (VAT), Whole Government Accounts (WGA), Civica Financials system training. This has been delivered through in person events and online via Microsoft Teams and webinars, as well as through knowledge sharing within the Finance team.

Project Focus

Red Projects

13. There is **one** project rated as **Red** and is considered off track.

Service	Project
Finance	
Finance	<ul style="list-style-type: none"> Finance system – development of system specification, and progression of a tender exercise to move towards contract award and implementation for a target date of Go-Live on 1 April 2025.

14. The finance system project has been placed on hold for quarter two because this project needs a period of stability in terms of IT Systems. There have been IT issues regarding interfaces from feeder systems e.g. ICON and the transfer of bank files. Resources in the team have been diverted to address these, which has taken a significant amount of time over the year. Once we have a robust interface from all feeder systems the project will proceed within the implementation of a new finance system.

Amber Projects

15. There are **16** projects that are rated as **Amber** and are considered slightly off track. There are a number of reasons that these projects are classified as Amber, but the main themes include unforeseen delays, unavoidable overspend and delays due to interdependencies The projects include:

Service	Project
Customer and Digital	
Customer Services	<ul style="list-style-type: none"> Review of all service-related policies (including Council Tax Local Discounts, Exemptions & Premiums and Council Tax Discretionary Reductions)
	<ul style="list-style-type: none"> Review of all service-related customer documentation (including Council Tax, Housing Benefit, Sundry Debts)
	<ul style="list-style-type: none"> Single Person Discount Review
	<ul style="list-style-type: none"> Review process of long-term empty property checks
ICT	<ul style="list-style-type: none"> Implement a new helpdesk solution
Communities	
Public Protection	<ul style="list-style-type: none"> Undertake a Full-Service Review
	<ul style="list-style-type: none"> Develop local Incentives to Support Lancashire County Councils Recipe for Health
Policy and Governance	

Audit and Risk	<ul style="list-style-type: none"> To standardise the approach to Business Continuity, implement CONNIE across both authorities for the recording and monitoring of BC plan. This will include configuration of the system, developing of guidance and user training. Monitoring and reporting arrangements to be established.
	<ul style="list-style-type: none"> Undertake a full BC exercise in Quarter 3 to ensure plans are robust and fit for purpose.
	<ul style="list-style-type: none"> Development of a suite of reports in relation to insurance claims to improve our overall approach to risk management.
Communications and Visitor Economy	<ul style="list-style-type: none"> Deliver the 2023 events programme
	<ul style="list-style-type: none"> Deliver first full year of operation at Worden Hall
	<ul style="list-style-type: none"> Deliver improvements to South Ribble Museum
Performance and Partnerships	<ul style="list-style-type: none"> Delivery of UKSPF programme
Finance	
Finance	<ul style="list-style-type: none"> Special Expenses at CBC - review and consideration of the findings of the work undertaken in 2022/23.
	<ul style="list-style-type: none"> Review of Financial Standing Orders and Financial Procedures across both councils – secure approval of the proposed amendments at Council

16. The review of all service-related policies has been rated amber for quarter two due to delays in completing the review of policies. Options to review the Council Tax Local Discounts and Premiums Policy will be presented in November to Shared Senior Management Team, Executive Members and Leaders to seek approval to consult with council, taxpayers, and stakeholders on proposed options to change the amounts of local discounts and premiums from 1 April 2024. The results of the consultation will be presented in January 2024 to senior management with final proposals for changes to the policy which will progress through the governance approval process to be formally adopted in February 2024 for the financial year 2024/25.
17. The review of all service-related customer documentation has been rated amber for quarter two. Due to the scale of the project, the expected date is later than initially projected. Good progress has been made during the last quarter with landlord notifications switching to wholly paperless and the implementation of combined summary Housing Benefit notifications on 1 November. The revised top five Council Tax and Sundry Debtors letters are also on track to be updated in their respective systems by the expected completion date.
18. The development of a suite of reports in relation to insurance claims project is rated amber because it started later than anticipated. However, the first set of these reports are going to be presented to the officer governance group in December 2023.

19. The single person discount review has been rated amber in quarter two. The project will review resident's entitlement to the Single Person Discount where there is more than one adult on the Electoral Register, through a National Fraud Initiative (NFI) Single Person Discount exercise. There have been delays to the NFI exercise, and the outcomes of the review are due to be uploaded into the National Fraud Initiative (NFI) portal in November 2023. Whilst there have been slight delays, progress has been made with letters sent to affected residents requesting they confirm their entitlement to the Single Person Discount. The discount has been cancelled where the resident reported a change in circumstances, or they did not respond to the request.
20. The review of long-term empty property checks to find the most efficient approach to check the status of long-term empty properties has been rated amber for quarter two. The project has experienced delays in the review impacting on the completion date. Work has progressed with the implementation of an improved mobile solution to manage property inspections. In quarter three, new risk-based parameters will be implemented to reduce the number of inspections required. New processes to review if a property is empty will be implemented and will include staff training.
21. The delivery of the 2023 events programme and first full year of operation at Worden Hall are both rated amber due to unforeseen overspends that have occurred. The events programme has overspent because the budget may need to be revisited in future as general operational costs have gone up. However, the budget has remained the same. The Worden Hall project has seen an overspend because of wider work taking place at the park to improve the area has impacted on wedding bookings and therefore impacted on bookings. It has been agreed that a permanent bar will be installed at the hall to help with functions which is currently underway. This will not impact the current budget and will help generate income to balance the previous overspend.
22. The projects to standardise the approach to business continuity, develop local incentives to support Lancashire County Council's recipe for health and deliver improvements to South Ribble Museum have received an amber rating due to delays caused by interdependencies such as costings from external companies. Once these costings have been received projects can resume as planned and be completed.
23. The review of financial standing orders and procedures across both councils has been rated amber due to the timescales for presentation for review and approval having slightly slipped. The review of financial standing orders and procedures is expected to go to Governance Committee in January and then on to Council for consideration and approval.
24. The special expenses project for CBC is rated amber as the timescale for the review and consideration of the work undertaken in quarter four of 2022/23 has moved to quarter four 2023/34. Information has been collated on costs and the areas covered by special expenses, along with the impact of changing methodologies. The project will be reassessed in January 2024 as part of the Budget Setting process.
25. The ICT Helpdesk solution project has been rated amber because of capacity issues that include staff absence and challenges in filling vacant posts within a highly competitive employment market. An exercise is currently underway to look options to address these challenges including temporary resource and repurposing some of the vacant posts into apprentice positions. It is anticipated that the ICT Helpdesk will be delivered by December 2023 using the support of temporary resource to fill the skills gap required within the service.

26. The project to undertake a full business continuity exercise in quarter three to ensure plans are robust and fit for purpose has been deferred to quarter four due to staffing capacity. Progress has been made with the first planning exercise undertaken and completed in early October. The business continuity exercise will complete in quarter four and this has been communicated with the Senior Leadership Team.
27. The delivery of the UKSPF programme has been marked as amber due to delays in receiving sign off and funding following submission of the investment plan to the Department for Levelling Up, Housing and Communities for UKSPF. This has impacted on delivery timescales for individual projects but despite this, the overall programme is on target for the end of the year.

Climate change and air quality

28. The work noted in the report impacts the following areas of climate change and Council Green Agenda sustainability targets:
 - Net carbon by 2030
 - Reducing waste production
 - Limiting non-sustainable forms of transport
 - Working with sustainable and green accredited companies
 - Limiting or improving air quality
 - Limiting water waste and flooding risks
 - Improving green areas and biodiversity

Equality and diversity

29. There are elements within service level business plans that will have a positive impact on equality and diversity. This includes for example activities to acquire properties for refugee resettlement, the opening of Tatton Gardens, and the evaluation of enhanced ESOL (English for speakers of other languages) provision.

Risk

30. As outlined in the report, key risks to delivery are capacity and resources. This risk continues to be monitored closely, through service and project-based risk registers.

Comments of the Statutory Finance Officer

31. There are no direct financial implications arising from this report.

Comments of the Monitoring Officer

32. The report is for information and noting – there are no direct legal implications arising.

Background documents

There are no background documents to this report.

Appendices

Appendix A – List of all business plan projects by directorate (Updated November 2023)

Report Author:	Email:	Telephone:	Date:
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Appendix A – List of all business plan projects by directorate (Updated November 2023)

COMMERCIAL AND PROPERTY SERVICES

Project	Status
Operational Assets	
Roll out of Tech Forge	Green
Delivery of new CCTV suite at Strawberry Fields and staff integration	Green
Identify a rent management system for Domestic properties	Green
Automated bookings system for community centres	Green
Property and Development	
Roll out of Asset Management System	Green

CUSTOMER AND DIGITAL

Project	Status
ICT	
Continue to progress completion of projects within the Shared Digital Strategy 2021-2024	Green
Continue with the renewal and expansion of the CCTV infrastructure	Green
Implement a new helpdesk solution	Amber
Implement a new backup solution across Councils to provide resilient failover	Green
Continue to improve cyber security and awareness across the Councils	Green
Website review.	Green
CRM System review.	Green
Garden Waste system review.	Green
Streetscene and Waste Management	
Delivery of year 2 milestones from the Streetscene Strategy	Green
Development and delivery of year 1 of the Waste Strategy	Green
Migration of risk assessments to new system	Green
Development of a Shared Fleet Strategy	Green
Customer Services	
Delivery of staff development & training plans	Green

Review of all service-related policies (including Council Tax Local Discounts, Exemptions & Premiums and Council Tax Discretionary Reductions)	Amber
Review of all service-related customer documentation (including Council Tax, Housing Benefit, Sundry Debts)	Amber
Implementation of Customer Access Charter	Green
Complete Enghouse Project Phase 2	Green
Single Person Discount Review	Amber
Review of Allpay contract	Completed
Review process of long-term empty property checks	Amber

Communities

Project	Status
Public Protection	
Undertake a Full-Service Review	Amber
Renew the Proactive housing policy with a focus on energy efficiency and excess cold	Green
Implement a Civil Penalties Policy	Completed
Develop local Incentives to Support Lancashire County Councils Recipe for Health	Amber
Awareness Campaign relating to Air Quality and Particulate Matter with Primary Schools	Green
To review the current byelaws in place for registration of beauty treatments in line with modern practices and achieve Secretary of State approval in connection with the Health and Care Act 2022	Green
Community Safety Partnership application to the 'Youth Endowment Fund' for 'A supportive home'	Completed
Communities and Housing	
Conduct Feasibility study on alternative community transport	Green
Review of social prescribing financial model – Social Prescribing	Green

Policy and Governance

Project Status	Status
Communication and Visitor Economy	
Deliver the 2023 events programme	Amber
Deliver first full year of operation at Worden Hall	Amber
Deliver the South Ribble tourism strategy	Green

Deliver the internal communications strategy and plan	Green
Deliver improvements to South Ribble Museum	Amber
Audit and Risk	
Embed the use of IDEA for sampling and data matching into audit reviews to improve efficiency and incorporate a larger footprint for testing.	Green
Implement HARRIET across both authorities for recording and monitoring of H&S risk assessments. This will include configuration of the system, developing of guidance and user training. Monitoring and reporting arrangements to be established.	Green
To standardise the approach to Business Continuity, implement CONNIE across both authorities for the recording and monitoring of BC plan. This will include configuration of the system, developing of guidance and user training. Monitoring and reporting arrangements to be established.	Amber
Undertake a full BC exercise in Quarter 3 to ensure plans are robust and fit for purpose.	Amber
Development of a suite of reports in relation to insurance claims to improve our overall approach to risk management.	Amber
Democratic, Scrutiny & Electoral Services	
Implementation of Member induction at Chorley and South Ribble from May 2023 (SRBC / CBC).	Complete
Delivery of council elections in Chorley and South Ribble (SRBC / CBC).	Complete
Streamlining of key processes across the service (including moving towards paperlite meeting, maximising use of technology, digitization and virtual post room etc.)	Green
Improve reporting on compliance with key deadlines and using the information to improve responsiveness (reports management, FOI, complaints etc.)	Green
Review of Civic Services, Mayoral support, Lancastrian management and cleaning (SRBC / CBC)	Green
Mod.gov move to cloud hosting	Complete
Develop a Member intranet for both Chorley and South Ribble (SRBC / CBC)	Green
Exploration of joint district council Health Scrutiny (SRBC / CBC).	Green
Procurement of specialist secure printing contract (SRBC / CBC).	Green
Legal and Procurement	
Introduction of IKEN for the whole legal team	Complete
Complete a review of the Contract Procedure Rules for both councils	Green
Review the Constitution of both councils	Green
Provide key support on all major projects for both councils	Complete
Complete Restructure of legal	Complete
Transformation and Partnerships	
HR Transformation Phase 2	Green
Delivery of UKSPF programme	Amber

Deliver the refreshed Transformation programme	Green
Economic Growth	
Deliver Economic Strategy	Green
Support the delivery of the UKSPF programme	Green
Deliver the Economic Strategy	Green
Support the delivery of the UKSPF programme	Green
Supporting the delivery of Leyland Town Deal	Green
Finance	
Treasury and Cash Management – improve cashflow forecasting, review processes and procedures to improve investment returns and to minimise borrowing and treasury costs across both councils.	Green
Embed new team structure – almost half the team are new in role/new to the organisation so training and development are a priority e.g. NNDR, Collection Fund Accounting, VAT, preparation of consolidated accounts, Corporation for subsidiary companies, whole of government accounts	Green
Finance system – development of system specification, and progression of a tender exercise to move towards contract award and implementation for a target date of Go-Live on 1st April 2025.	Red
Review of financial processes and procedures across all areas of the team, to streamline and improve efficiency, effectiveness, levels of internal control and to maximise the use of the resources available. The review will seek to share knowledge to build resilience and capacity within the team and require training as necessary. This will include, but is not limited, to reviews in respect of; <ul style="list-style-type: none"> • Bank reconciliations and account maintenance • Balance Sheet Reconciliations • VAT • NNDR and Council Tax forecasting • Charities and Trust Accounts • Purchase Ordering and Creditor processing • Payroll reporting 	Green
Data Review and Cleanse - exercises across Civica Financials and the Shared Drive in readiness for migration to a new finance system and to SharePoint respectively	Green
Review of Financial Standing Orders and Financial Procedures across both councils - secure approval of the proposed amendments at Council	Amber
Special Expenses at CBC – review and consideration of the findings of the work undertaken in Quarter 4 2022/23	Amber
Intranet and Websites - review and update of Finance related content at both councils	Green
Development and support for the delivery of the Savings Programme - these are required across the 2 councils to close the budget gaps identified for 2024/25 and 2025/26	Green

Planning and Development

Project Status	
Planning and Enforcement	
Scope and implement a shared service model for Building Control	Green
Produce and publish an Environmental Crime Enforcement Policy	Green
Produce and publish a Dangerous Structures Policy	Green
Spatial Planning	
Deliver Open Space Sport Recreation strategy schemes with funding allocated	Completed
To deliver key Climate Change Strategy projects (including Develop cycle, walking and wheeling initiatives for the Borough, Develop use of green energy in the Borough, cycle parking and storage)	Green
Commission of EV Feasibility and Preparation of EV Strategy	Green