REPORT TO: **POLICY & RESOURCES COMMITTEE - 27 APRIL 2009**

REPORT ON: **FINANCE REVENUES SERVICE PLAN UPDATE**

REPORT BY: **DEPUTE CHIEF EXECUTIVE (FINANCE)**

REPORT NO: **207-2009**

1.0 PURPOSE OF REPORT

To seek committee approval of the Finance Revenues Service Plan Update

2.0 RECOMMENDATIONS

It is recommended that Committee approves the Finance Revenues Service Plan Update.

3.0 FINANCIAL IMPLICATIONS

Projects and actions proposed in the Plan are provided for in the Division's Revenue Budget and Capital Plan.

4.0 MAIN TEXT

4.1 This report updates the Department's service plan 2007-2011 as approved by the committee on 10 December 2007, report number 653-2007. The aim is to update the projects under the relevant Department objectives. The opportunity has also been taken to check that the department's objectives are aligned to the Dundee Single Outcome Agreement. The Department's performance indicators are regularly scrutinised by the Best Value Performance and Efficiency Sub Committee and in the Council's annual performance report as well as by the Department's management team.

4.2 Links to the Single Outcome Agreement

The Council approved the Single Outcome Agreement between our Dundee partners and the Scottish Government. The Department's objectives contribute to these outcomes as follows.

Dundee SOA outcome	Department Service Plan Objective
Dundee Outcome 10 - Our people will have high quality and accessible local services and facilities.	• To improve update of Direct Debit payers for Council Tax to 50% by 2010
	• To improve in year Council Tax collection to 93.5% by 31 March 2011
	• To improve in year Non Domestic Rates collection to 98% by 31 March 2011
	• To maintain a high level of benefit fraud detection
	• To maintain a high level of customer satisfaction

4.3 Projects and Initiatives

Appendix 1 sets out the projects and reviews being carried out under each of the department's objectives. This includes the latest update on ongoing projects.

4.4 To address new challenges and areas for improvement 3 new projects and initiatives have been added to the service plan. See table below.

Service Plan Objective	New Project Description
Maintain a high level of customer satisfaction	• Roll out use of 24 hour telephone payment line to remaining services
	• Upgrade to core Council Tax and Benefit computer system
	• Lean Service review of customer contact

4.5 Projects Completed

There have been 3 projects completed since the service plan was approved and they will now be removed from the service plan. These are listed below:-

• Implementation of Local Housing Allowance
• Implementation of Corporate Visiting System
• Maximise payment of Housing Benefits by BACS

4.6 Projects On Schedule

• Rollout Home working Pilot - There are currently 17 Accounts/Benefits staff working from home. It is envisaged that the 8 Visiting Officers in the Revenues Division will also be home based in the near future.

4.7 Projects behind schedule

The following projects are behind schedule and corrective action is being taken however where it cannot now be completed close to the original schedule a new deadline has been set as follows:

• Maximises the Recovery of Housing Benefit overpayments - new deadline September 2009
• Implementation of General Filing - new deadline December 2009. The Revenues Division currently operates a Document Imaging and Workflow system for its Council Tax and Benefits core functions. The General Filing module of the software package will allow the majority of all other incoming documentation to be scanned to the computer system.

4.8 Performance Management

The service plan is at the core of the department's performance management system and is systematically monitored and reviewed by the management team. All the projects and performance measures are scrutinised in a corporate system and reported to the Best Value Performance and Efficiency Sub Committee and exception reports are produced on performance falling behind targets or project milestones. The projects included in the Appendix 1 are all contained in the council's online planning and monitoring database for ongoing updating on progress. The Service Plan update will be added to the plans and performance page of the Council's website.

4.9   Risk Register

The department has reviewed its risk register based on this service plan update and there are no changes to the Departments risk register profile.

5.0   POLICY IMPLICATIONS

This Report has been screened for any policy implications in respect of Sustainability, Strategic Environmental Assessment, Anti-Poverty, Equality Impact Assessment and Risk Management.

Appendix 2 contains the results of the screening of new projects for Equalities and Diversity issues.

The report has been EQIA Screened and has a Low/Nil adverse affect on any of the Equality Groups. This Report does not require a full EQIA.

6.0   CONSULTATIONS

The Chief Executive, Head of Finance and Performance & Improvement Manager have been consulted on the content of this report

7.0   BACKGROUND PAPERS

None

DAVID DORWARD   DATE:
DEPUTE CHIEF EXECUTIVE (FINANCE)

Objective: Maintain high level of customer satisfaction							
Project Description	**Current Status**	**Latest assessment**	**Lead Officer**	**Start Date**	**End Date**	**Financial Allocation**	**Strategic Theme**
Implementation of Local Housing Allowance	Completed	Training, systems changes and procedures all completed and bedding down.	DO/PD	04/07	04/08	£193,000	ICT
Implementation of Corporate Visiting System	Completed	System implemented.	AC/BM	12/06	04/08	Existing Resources	ICT / Efficiency
Maximise payment of Housing Benefits by BACS	Completed	Project completed, but will be reviewed for further increases in BACS payments.	DO	06/07	06/08	Existing Resources	ICT / Efficiency
Rollout of home working pilot	On Schedule	Other areas within the service are now considering if home working can be implemented.	IG	06/06	04/10	Existing Resources	ICT / Efficiency
Maximise the recovery of Housing Benefit overpayments	Behind	Unfortunately this project has an element that is dependant on an external software provider so only this part of the project is still to be completed. New deadline has been set.	AC	06/06	09/09	Existing Resources	ICT / Efficiency
Implementation of General Filing	Behind	Due to other priorities this project has not been completed, but it has been set a new deadline.	AC/PD	09/07	12/09	Existing Resources	ICT / Efficiency

Objective: Maintain high level of customer satisfaction							
Project Description	**Current Status**	**Latest assessment**	**Lead Officer**	**Start Date**	**End Date**	**Financial Allocation**	**Strategic Theme**
Roll out use of 24 hour telephone payment line to remaining services	New	System already implemented for Revenues and Housing now to be rolled out corporately.	TR	04/09	08/09	Existing Resources	ICT / Efficiency
Upgrade to core Council Tax and Benefits computer system	New	Major release to improve front line access to our core system.	PD	04/09	01/10	Existing Resources	ICT
Lean Service review of customer contact	New	Project is currently underway to improve customer's experience when dealing with our contact centre.	IG	03/09	09/09	Existing Resources	Efficiency

Service Planning - EQIA Screening - Finance Revenues

Policy/Function	Equality Group								Evidence	Equality Indicator	Decision	Lead Officer	Target Date
	AGE	DEP	DIS	GEN	LGBT	OFF	REL	RACE					
Roll out use of 24 hour telephone payment line corporately	L	L	L	L	L	L	L	L	EQIA screening completed 18 Feb 2008	1	**N/A**	TR	Aug 09
Upgrade to core Council Tax and Benefits computer system									This is an upgrade to our existing software and will have no adverse effect on any Equality Group. However, an EQIA screening will be carried out before the project commences in Summer 2009.	**N/A**	**ER**	PD	Jan 10
Lean Service review of customer contact via Enquiry Team									This is a corporately initiated project. So far Revenues it has nor resulted in new policies or changes to functions or procedures. EQIAs will be carried out if changes are recommended existing policies, procedures or functions.	**N/A**	**ER**	IG	Sept 09

Explanation of Terms:	Possible Decisions
DEP: People with dependents DIS: People with disabilities GEN: Gender LGBT: People who are lesbian, gay, bisexual or transgender OFF: People with an offending past REL: People with differing religious beliefs	L = low impact M = Medium Impact H = High Impact SP: Place as an equality action in service plan* FIA: Complete a full Impact Assessment ER: Complete an equality screening at next review * This may include formal service plans, team plans or individual job plans