

Policy and Resources Committee	
Meeting Date	31 January 2024
Report Title	Revenues and Benefits proposed shared service report
EMT Lead	Lisa Fillery, Director of Resources
Head of Service	Zoe Kent, Revenues and Benefits Manager
Lead Officer	Zoe Kent, Revenues and Benefits Manager
Classification	Open
Recommendations	<ol style="list-style-type: none"> 1. That Swale Revenues and Benefits team join the Mid Kent Revenues and Benefits partnership. 2. Delegation is awarded to the Director of Resources to make the appropriate arrangements in line with the business case and sign the shared service collaboration agreement.

1 Purpose of Report and Executive Summary

- 1.1 In 2021 as part of a review of services a proposal was put forward for the Swale Revenues and Benefits team to join the Mid Kent shared service. This report provides an update on the progress since 2021 and makes recommendations on the next steps.

2 Background

- 2.1 In August 2021 work commenced on the proposal for Swale to join the Mid Kent Revenues and Benefits shared service. The project was paused at the beginning of 2022 to allow work to be carried out to align systems and working practices before the proposal was considered again, and if approved moved forward. The Revenues and Benefits Manager took over the interim management of the Mid Kent Revenues and Benefits service. This was the first step towards the shared service and has been used to align processes and to measure the viability of the three-way partnership.
- 2.2 The Mid Kent full board requested that before the proposal was considered by the board again, the following changes were made:
- The Council Tax Reduction Scheme (CTRS) changed to a banded scheme
 - The Document Management system changed to NEC Information@Work (I@W) in line with Mid Kent and;

- The Revenues and Benefit customer contact (phone calls and appointments) moved to Swale Customer Services Centre (CSC).
- 2.3 In January 2023 Full Council approved the CTRS banded scheme. The new scheme went live in April 2023. Automation of the daily Universal Credit information received from the Department for Work and Pensions (DWP) was implemented in July 2023 and 65% - 70% of alerts received are now automated on a daily basis. This has reduced the amount of work being dealt with by the team and will improve performance.
- 2.4 The move to the NEC I@W document management system is at the testing stage. Workshops have been held with Mid Kent Revenues and Benefits to ensure processes and document types are aligned.
- 2.5 The Benefits and Council Tax calls moved to Customer Services from 1 November 2023. The team are taking all calls and interviews, the system is working well.
- 2.6 The business case has been completed and has considered the structure and the costs of the shared service including the charging for the service. The Revenues and Benefits Manger has had an oversight of the Mid Kent Revenues and Benefits shared service for almost two years. This has enabled the services to start to be aligned ahead of this proposal.
- 2.7 The timetable for the business case being considered and being moved forward (if approved by the three councils) is shown in table 1. All three councils will need to approve SBC joining the partnership for it to be agreed.

Table 1

Decision Process	By end of:
Tunbridge Wells - Finance and Governance Advisory Board	23 January 2024
Swale – Decision by Policy and Resources Committee	31 January 2024
Maidstone – Corporate Services Policy Advisory Committee	5 February 2024
Decision by Maidstone & Tunbridge Wells Cabinets	14 February 2024

- 2.8 If the proposed service was not to go ahead the changes that have been made to date are beneficial and will help the team to carry out their roles more effectively.

3 Proposals

- 3.1 It is proposed that the Swale Revenues and Benefits team join the Mid Kent Revenues and Benefits Partnership. This proposal should bring, savings to the council, avoid possible future additional staffing costs that may be incurred if the

council does not join the shared service, and provide resilience particularly to the smaller parts of the team such as Business Rates.

- 3.2 A significant amount of work has been put into the proposed structure to ensure that the service is robust and able to meet the challenges that are likely to be met from legislation changes, the cost-of-living crisis, the age demographic of the current team and the changes to Revenues and Benefits that are likely to happen over the next few years.
- 3.3 Appendix II shows the savings and costs of moving to the partnership, that are proposed in year one and years 3 to 5. It is not proposed to make any savings in year 2 to give the new structure time to bed in. The share of savings and costs are based on the caseloads of each authority. The transfer of the service is self-funding as the one-off savings are covered by the ongoing base budget savings. The initial one-off costs are to be funded from the Revenues and Benefits reserve as planned within the Medium Term Financial Plan.
- 3.4 The new partnership will look to build resilience across all teams within the Revenues and Benefits service. In particular managing temporary accommodation claims, dealing with vulnerable customers, supporting businesses and managing customers who are in arrears. Further resilience will be built in the business support team where software is provided to departments across the councils.

4 Alternative Options Considered and Rejected

- 4.1 The Revenues and Benefits team could stay within Swale and not join the Mid Kent Revenues and Benefits shared service. This is not recommended because it brings risks. In terms of capacity and ability to be able to deliver further savings – this is examined in table 7 of appendix I.
- 4.2 The workforce is becoming older, and this leaves the team vulnerable to losing experience and resilience. The opportunity to make future savings through future procurement across three authorities will be lost.
- 4.3 The team could look to join another shared service within Kent. This is also not recommended because it is likely to take time and could bring additional costs if there was a need to change software suppliers.

5 Consultation Undertaken or Proposed

- 5.1 Consultation will be undertaken with the Revenues and Benefits team members and Unison.

6 Implications

Issue	Implications
Corporate Plan	The objectives and priorities in the corporate plan.
Financial, Resource and Property	The financial implications have been reviewed by the Section 151 officer and the Mid Kent Services Board.
Legal, Statutory and Procurement	<p>The Council has the power under the Local Government Act 1972 and other enabling powers to enter into shared arrangements for the provision of this service. Any resulting partnership arrangement will be made pursuant to Section 113 of the Local Government Act 1972, which allows a local authority to place any of its officers, who consent to the arrangement, at the disposal of another local authority on such terms as may be agreed between the parties.</p> <p>A collaboration agreement will be approved by Mid Kent Legal if the shared service is approved.</p>
Crime and Disorder	Not applicable
Environment and Climate/Ecological Emergency	Not applicable
Health and Wellbeing	The health and wellbeing of staff will be considered as part of the consultation periods.
Safeguarding of Children, Young People and Vulnerable Adults	Not applicable
Risk Management and Health and Safety	A risk assessment will be carried out as part of the business case.
Equality and Diversity	An equality impact assessment will be carried out.
Privacy and Data Protection	A data protection impact assessment will be carried out.

7 Appendices

Appendix I: Business case - (2024) Combining Mid Kent Services Revenues and Benefits Service with Swale Borough Council Revenues and Benefits Service
Appendix II Exempt: Business Case Financial Information - Restricted