

# Finance, Economy and Corporate Services Scrutiny Committee



Committee Room 2, 5th Floor, Fife House, North Street,  
Glenrothes

Thursday, 29 August, 2024 - 10.00 am

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## AGENDA

### Page Nos.

1. **APOLOGIES FOR ABSENCE**
2. **DECLARATIONS OF INTEREST** – In terms of Section 5 of the Code of Conduct Members of the Committee are asked to declare any interest(s) in particular items on the agenda and the nature of the interest(s) at this stage.
3. **MINUTE** – Minute of meeting of Finance, Economy & Corporate Services Scrutiny Committee of 13 June 2024 4 – 6
4. **ASSET AND ESTATES UPDATE** – Report by the Head of Property Services 7 – 18
5. **ANNUAL HEALTH AND SAFETY REPORT 2023-24** – Report by the Head of Human Resources 19 – 38
6. **PLANNING SERVICES - ANNUAL SERVICE REVIEW REPORT 2023-2024** – Report by the Head of Planning Services 39 – 61
7. **MANAGEMENT OF DEVELOPER OBLIGATION FUNDS** – Report by the Head of Planning Services 62 – 67
8. **2023/24 - REVENUE MONITORING PROVISIONAL OUTTURN - PLANNING SERVICE, BUSINESS AND EMPLOYABILITY SERVICE** – Joint Report by the Executive Director Finance & Corporate Services and the Executive Director - Place 68 – 71
9. **2024/25 - REVENUE MONITORING PROJECTED OUTTURN - PLANNING SERVICE, BUSINESS AND EMPLOYABILITY SERVICE** – Joint Report by the Executive Director Finance & Corporate Services and the Executive Director - Place 72 – 74
10. **2023/24 CAPITAL MONITORING PROVISIONAL OUTTURN - BUSINESS AND EMPLOYABILITY SERVICE** – Joint Report by the Executive Director Finance & Corporate Services and the Executive Director - Place 75 – 81
11. **2024/25 - CAPITAL MONITORING PROJECTED OUTTURN - BUSINESS AND EMPLOYABILITY SERVICE** – Joint Report by the Executive Director Finance & Corporate Services and the Executive Director - Place 82 – 86
12. **2023/24 REVENUE MONITORING PROVISIONAL OUTTURN - FINANCE AND CORPORATE SERVICES** – Report by the Executive Director Finance & Corporate Services 87 – 91

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| <b>13.</b> | <b>2024/25 REVENUE MONITORING PROJECTED OUTTURN – FINANCE AND CORPORATE SERVICES</b> – Report by the Executive Director Finance & Corporate Services   | 92 – 95   |
| <b>14.</b> | <b>2023/24 CAPITAL MONITORING PROVISIONAL OUTTURN - FINANCE AND CORPORATE SERVICES</b> – Report by the Executive Director Finance & Corporate Services | 96 – 100  |
| <b>15.</b> | <b>2024/25 CAPITAL MONITORING PROJECTED OUTTURN - FINANCE AND CORPORATE SERVICES</b> – Report by the Executive Director Finance & Corporate Services   | 101 – 105 |
| <b>16.</b> | <b>FINANCE, ECONOMY &amp; CORPORATE SERVICES FORWARD WORK PLAN</b> – Report by the Executive Director Finance & Corporate Services                     | 106 – 110 |

**Members are reminded that should they have queries on the detail of a report they should, where possible, contact the report authors in advance of the meeting to seek clarification.**

Lindsay Thomson  
Head of Legal and Democratic Services  
Finance and Corporate Services

Fife House  
North Street  
Glenrothes  
Fife, KY7 5LT

22 August, 2024

If telephoning, please ask for:  
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## **BLENDED MEETING NOTICE**

This is a formal meeting of the Committee and the required standards of behaviour and discussion are the same as in a face to face meeting. Unless otherwise agreed, Standing Orders will apply to the proceedings and the terms of the Councillors' Code of Conduct will apply in the normal way

For those members who have joined the meeting remotely, if they need to leave the meeting for any reason, they should use the Meeting Chat to advise of this. If a member loses their connection during the meeting, they should make every effort to rejoin the meeting but, if this is not possible, the Committee Officer will note their absence for the remainder of the meeting. If a member must leave the meeting due to a declaration of interest, they should remain out of the meeting until invited back in by the Committee Officer.

If a member wishes to ask a question, speak on any item or move a motion or amendment, they should indicate this by raising their hand at the appropriate time and will then be invited to speak. Those joining remotely should use the "Raise hand" function in Teams.

All decisions taken during this meeting, will be done so by means of a Roll Call vote.

Where items are for noting or where there has been no dissent or contrary view expressed during any debate, either verbally or by the member indicating they wish to speak, the Convener will assume the matter has been agreed.

There will be a short break in proceedings after approximately 90 minutes.

Members joining remotely are reminded to have cameras switched on during meetings and mute microphones when not speaking. During any breaks or adjournments please switch cameras off.

## 2024 FECSS 37

### THE FIFE COUNCIL - FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE - BLENDED MEETING

Committee Room 2, Fife House, North Street, Glenrothes

13 June 2024

10.00 am - 11.40 am

**PRESENT:** Councillors Allan Knox (Convener), Alistair Bain, Lynn Ballantyne-Wardlaw, Auxi Barrera, Ian Cameron, Rod Cavanagh, Graeme Downie, Gary Holt, Robin Lawson, James Leslie, Gordon Pryde, Sam Steele (substituting for Councillor Stefan Hoggan), Alistair Suttie and Ann Verner.

**ATTENDING:** Eileen Rowand, Executive Director (Finance and Corporate Services), Lindsay Thomson, Head of Legal and Democratic Services, Helena Couperwhite, Service Manager (Committees Services) and Michelle McDermott, Committee Officer, Legal and Democratic Services, Finance and Corporate Services; Sharon McKenzie, Head of Human Resources, Jacqui Stewart, HR Team Manager, Nicola Harris, HR Lead Officer and Gordon Walker, HR Lead Officer, Human Resources; Pam Ewen, Head of Planning Services and Alastair Hamilton, Service Manager, Planning Services.

**APOLOGY FOR ABSENCE:** Councillor Stefan Hoggan.

#### 104. DECLARATIONS OF INTEREST

No declarations of interest were submitted in terms of Standing Order No. 22.

#### 105. MINUTE

The committee considered the minute of the Finance, Economy and Corporate Services Scrutiny committee of 18 April 2024.

##### Decision

The committee agreed to approve the minute.

#### 106. RECRUITMENT AND RETENTION UPDATE

The committee considered a report by the Head of Human Resources providing context around the profile of recruitment and retention within Fife Council. The report highlighted some of the work which had been undertaken to ensure recruitment and retention difficulties were monitored and mitigated as much as practicable in supporting the delivery of the workforce strategy - Our People Matter (OPM).

##### Decision

The committee:-

- (1) noted the challenges Fife Council faced in relation to recruitment and retention;

- (2) endorsed the actions that had been taken in response to the challenges; and
- (3) agreed that a report be submitted back to Scrutiny Committee in a year's time.

**107. ATTENDANCE MANAGEMENT - PERFORMANCE AND IMPROVEMENT UPDATE REPORT**

The committee considered a report by the Head of Human Resources providing an update on the work to effect improvements and raise performance on attendance. The report also provided an update on the establishment of a new Attendance Support Unit (ASU) and information on the council's performance for the Statutory Performance Indicator (SPI) on absence.

**Decision**

The committee:-

- (1) noted the challenges that faced the council in relation to managing absence levels;
- (2) endorsed the actions that had been taken in response to the challenges, including training, pilots and the progress made with ASU activity; and
- (3) noted the Statutory Performance Indicator for 2023/24 and the ambition to move away from the bottom quartile within the next 18 months.

**108. PLANNING SERVICE ENFORCEMENT PERFORMANCE UPDATE REPORT**

The committee considered a report by the Head of Planning Services providing an update on planning enforcement and the details of recent and forthcoming improvements to, and availability of, performance information.

**Decision**

The committee:-

- (1) scrutinised the performance of planning enforcement; and
- (2) noted the recent and ongoing improvements to the reporting and availability of information relating to the work of planning enforcement.

**108. COMMUNITY COUNCILS - SCHEME FOR THE ESTABLISHMENT OF COMMUNITY COUNCILS IN FIFE - REVIEW PROCESS**

The committee considered a report by the Executive Director (Finance and Corporate Services) outlining the approach taken at the recent community council elections and providing feedback on the process. Members were asked to consider a review of the scheme for the Establishment of Community Councils in Fife, including its boundaries and election rules, in light of the new model scheme issued by the Improvement Service.

**Decision**

The committee noted:-

- (1) the contents of the report;
- (2) the introduction of a new model scheme prepared by the Improvement Service which had been endorsed by the Scottish Government; and
- (3) the proposed process and timescales for the Review of the Scheme of Establishment of Community Councils in Fife including its boundaries and election rules.

**110. FINANCE, ECONOMY AND CORPORATE SERVICES FORWARD WORK PROGRAMME**

The committee considered a report by the Executive Director (Finance and Corporate Services) outlining the draft Forward Work Programme for future meetings of this committee.

**Decision**

The committee noted the draft Finance, Economy and Corporate Services Scrutiny Forward Work Programme.

29 August 2024

Agenda Item No. 4

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## Asset and Estates Update

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**Report by:** Alan Paul, Head of Property Services

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**Wards Affected:** All

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### Purpose

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This report outlines some of the key activities undertaken by the teams responsible for property acquisition, disposal, property management and strategic oversight of council assets over the course of the past year.

### Recommendation(s)

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The Committee is asked to consider the information contained in the report and appendices, noting the performance in three areas;

- Asset Strategy including asset utilisation
- Vacant property
- Capital receipts

### Resource Implications

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There are no resource implications directly arising from this update report.

### Legal & Risk Implications

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There are no material risks or legal issues anticipated arising beyond those identified and addressed in the individual projects and programmes, with any necessary mitigating actions implemented.

### Impact Assessment

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An Equality Impact Assessment does not require to be carried out as this report does not propose any change to existing Council policies.

### Consultation

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Regular engagement with Council Services and partner organisations is carried out in line with the activities described in the annual update.

## 1.0 Background

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- 1.1 The non Council housing assets under management number in excess 1700, with a building area just under one million Sq ft and an asset value of £2.49bn. It is a sizeable portfolio which incurs a considerable cost to the council, as a consequence it is important that there is effective management of the assets and a focus on cost reduction and increased effectiveness.
- 1.2 Following consideration of the asset management strategy for the 2023-28-year period, and reports on both asset utilisation and vacant properties, Committee Members requested that annual updates be provided. This report sets out some of the key activities undertaken in the last year; the objective being to drive more efficient use of our assets, whilst improving stewardship of both occupied and vacant properties. The more proactive approach includes engagement with partner organisations and Services to ensure our assets support frontline service delivery and community needs.
- 1.3 Performance in some of the key areas over the past twelve months is detailed below.

## 2.0 Asset Management

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- 2.1 Since the Asset Management Strategy for the period 2023- 28 was considered by the scrutiny committees last year, changes to reshape and improve the property estate have been implemented. Activity to improve utilisation undertaken and effectiveness whilst also supporting improvements in community provision includes;
- 2.2 Working in collaboration with community partners - we have accommodated new organisations or additional staff from the NHS, Nature Scot, Police Scotland. Preliminary discussions have also commenced with Scottish Water and Visit Scotland who have both indicated interest in co-locating.
- 2.3 Significant rationalisation and improvement of the corporate offices has taken place with the closure and relocation of the 450 staff formerly based in New City House and Rothesay House. These closures delivered significant revenue savings and, help to improve utilisation in retained facilities whilst also assisting the carbon reduction ambitions.
- 2.4 Regular Service engagement meetings are also taking place to ensure there is awareness of the need for change and efficient use of accommodation, whilst also providing Services the opportunity to set out their future needs for improved customer service delivery.
- 2.5 In support of Community Wealth Building a short life working group was formed to identify opportunities for improving decentralisation and place responsiveness. The Kirkcaldy decentralisation pilot explored the experience of community organisations and identified a series of improvements.



## 3.0 Asset utilisation

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- 3.1 It was evident that the adoption of the home/office blended working has caused the corporate offices to remain significantly underutilised. To gain a better insight into current utilisation, an exercise to determine occupancy was undertaken during Spring 2024 in each of the corporate offices with workstation usage recorded over a two-week period.
- 3.2 Despite the closure of NCH (3,300 sq m), and Rothesay House (6650 sq m), representing a reduction in floorspace of approximately 10%, with staff transferred to alternative locations, the survey confirmed that there has been a decrease in office utilisation in comparison with the 2023 findings.
- 3.3 Average weekly utilisation remains low varying between 22% and 64% (with daily attendance ranging from 15% to 81%). Consistent with previous counts, office attendance is typically lower on Mondays and Fridays with a peak on Wednesday. Fuller details of the findings are provided in **Appendix 1**.
- 3.4 In order to improve occupancy levels, engagement has taken place with a number of partner organisations to explore the scope to accommodate their needs. Successes to date include;
- Police Scotland who have taken additional space at Brunton house Cowdenbeath
  - Nature Scot, who have taken entry to County buildings with circa 18 staff (July 2024) and
  - Fife NHS, who will move staff into reconfigured space within Fife House and Bankhead in phases commencing August 2024.
- 3.5 In the light of the utilisation findings opportunities for further rationalisation, intensification of use and disposal within the corporate office estate will be explored over the coming year. It is also anticipated that additional areas of the council's property portfolio will be the subject of utilisation studies, including leisure and community facilities.

## 4.0 Vacant accommodation

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- 4.1 In addition to under occupied facilities, there are a number of wholly unoccupied premises. The table below details the current vacant properties. Though the total is the same as in the August 2023 report, it should be noted that the vacant property list is dynamic with regular churn. Of the 30 assets detailed in the August 2023 report seven have been removed and seven added during the course of the year.
- 4.2 The full list of current vacant properties is detailed in **Appendix 2** but current vacant assets are summarised in the table below;

<b>Asset Status</b>	<b>July 2024</b>	<b>Description</b>
Number on market and under offer	6	
Number on the market and available	1	
Not on the market awaiting demolition	3	Assets which are incapable of sale or occupation by 3 <sup>rd</sup> parties, or which have low values are the subject of demolition proposals e.g. janitors house within school grounds.
Retain – Project development	10	Retained by a Council Service to support Service or corporate priorities such as the Affordable Housing Programme or for Early Years Nursery Provision.
Pending - Not on market - Pre-marketing, awaiting Service decision, resolution of legal issue etc	10	Services may be undertaking feasibility or exploring funding in addition to the usual design, procurement and development processes. In some other instances, legal aspects require to be resolved prior to marketing.
Total number	30	

- 4.3 The majority of assets will not be disposed but are vacant short-term pending reuse. To reduce risk and minimise the risk of damage or losses, a number of changes have been introduced to improve management and security of assets whilst vacant. Proactive management is undertaken with external contractors engaged to assess the risks and implement proportionate security measures.

## 5.0 Income receipts

- 5.1 Disposing of land and buildings reduces the running costs arising from the property portfolio, whilst the sales also generate monies for the general fund supporting the capital plan. One-off capital receipts from property disposals (excluding HRA transactions and ring-fenced receipts) over the course of the 12 months to March 2024 totalled £3.37m (this compares with an average of £5.0m over the past 10 years).
- 5.2 With the exception of Woodmill, St Columba's and Inverkeithing High School sites there are few high value asset disposals currently anticipated over the next 5 years, with an average annual total income of £2m profiled over the period. Whilst consolidation and closure of facilities may result in surplus assets for disposal which then generate additional receipts, the likelihood is that previous highs will not be reached. The table below details recent, current and anticipated income from disposals

<b>Year</b>	<b>Anticipated</b>	<b>Actual</b>
2022/23	£9.93m	£11.27m
2023/24	£4.153m	£3.371m
2024/25	£1.387m	-

- 5.3 Individual sales for 2023/24 are shown in **Appendix 3**, whilst **Appendix 4** provides details of the individual disposals and anticipated receipts in future years.
- 5.4 It should be noted that the receipts are reduced as a consequence of the support of council priorities, for example transfers to HRA are undertaken at 50% of market value. Similarly, the council has embraced the CAT legislation (which has largely subsumed the Council's previous approach to asset disposals to community and similar organisations) and disposes assets at less than market value in recognition of the community or other benefits arising.
- 5.5 **Revenue receipts**  
In the financial year 2023/24 rental income from leased out portfolio increased from £4.15m to £5.06m. Considerable support continues to be given to sports clubs, community and not-for-profit organisations, with circa £1m of annual rent reductions granted under the Subsidised Lease Policy.
- 5.6 One notable activity completed during the year was the rating appeals against the 2017 revaluation, the appeals process secured annual revenue savings which averaged circa £8.5m.
- 5.7 The removal of floor space through lease termination (New City House), demolition (Rothesay House) or sale (former local office St Andrews) supports the ambition to reduce property portfolio operating costs (circa £700,000 pa).

## **6.0 Future priorities and challenges**

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- 6.1 The widespread adoption of blended working will necessitate further shrinkage the operational office estate. The five-year asset strategy sets out a framework to support the continued improvement and spatial reduction of the property portfolio, whilst providing an improved and more fit-for-purpose asset base from which to serve our community and workforce.
- 6.2 The maintenance requirements and revenue costs arising from day to day building operations will drive change, and this will necessitate greater engagement with Services to ensure retained assets align with anticipated future needs. Similarly, we will continue to work with our partner organisations to share and integrate service delivery.
- 6.3 Another key challenge is to maintain the Council's operational assets in a safe and useable condition, complying with all statutory and legislative requirements within

available budgetary constraints. Reduction and rationalisation will reduce the pressures.

## **7.0 Conclusion**

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- 7.1 Whilst further change and improvements are still required, it is evident that we have delivered a smaller, more integrated and modern operational property estate; provided improved working environments which support service delivery to our communities, whilst generating income and reducing running costs that would otherwise be incurred.

### **List of Appendices**

Appendix 1 - Utilisation findings

Appendix 2 - Vacant property portfolio changes

Appendix 3 - Capital Receipts – 2023/24

Appendix 4 - Anticipated Capital Receipts – 2024 - 2029

### **Report Contact**

**Michael O’Gorman**

**Service Manager**

**Asset and Estates**

**Bankhead Central**

**Glenrothes**

**KY7 6GH**

**03451 55 55 55 Ext 440498**

## Appendix 1

### Corporate Office Estate Utilisation

Utilisation is simply the number of staff in the office versus the available number of desks, expressed as a percentage. This has been calculated on a daily and a weekly basis. In most of the buildings, office use is typically lower on Mondays and Fridays, with a peak on a Wednesday. The use of daily figures gives an indication of peak utilisation, whilst the use of weekly figures gives an indication of overall utilisation. These figures are included in the table below together with a comparison with the previous years data where this was available.

To quantify the level of efficiency within the building as well as gain an understanding on how space is currently being used, Asset Management supported by FM, carried out utilisation surveys in the buildings between 21st February and 14th June spending 2 weeks in each building. Due to the absence of any system data to determine occupancy, a manual count of occupied desks was completed twice daily avoiding the typical lunchtime and tea break periods wherever possible.

Average weekly utilisation sits between 22% and 64% with daily utilisation ranging from 15% to 81%. It is noted that a certain level of tolerance is required when using this data due to the nature of the measurement however, the data indicates that even allowing for under counting there is more than adequate capacity in the estate to cope with daily peaks. An important aspect to note is that the data also highlights that there has been a decrease in office use from 2023.

### Future Improvements

The utilisation surveys together with staff workshops, highlighted that most of the services have either an adequate amount or too much desk space. Therefore, to maximise building efficiency, Asset Management will revisit the allocation of desk space with the services.

The introduction of more online meetings via Teams has highlighted a requirement for additional small call boxes for confidential meetings or supervision. This can be achieved by redesigning the collaboration spaces to better support these activities as well as addressing the requirements for a flexible space that can be used for both corporate training and special projects.

In addition to these internal improvements, the financial and operational benefits of collaboration and co-location with partner organisations within our office accommodation is being explored as exemplified by the work with officers from the NHS and internal Services to identify how best to locate NHS staff within our corporate estate.

## Appendix 1

Building	No. of Desks	Min Staff	Max Staff	Ave No. of staff	Min Daily	Max Daily	Ave 2023	Ave 2024	Difference
	on a day			in period	Utilisation		Utilisation		
Dunfermline City Chambers	20	6	20	11	30%	100%	-	55%	N/A
Brunton House Cowdenbeath	158	47	78	60	32%	47%	60%	38%	-22%
Halbeath Depot Dunfermline	67 <sup>1</sup>	14	26	20	25%	36%	-	30%	N/A
Inverkeithing Civic Centre	35	3	9	7	13%	26%	-	20%	N/A
Town House Kirkcaldy	209	43	95	74	24%	44%	57%	35%	-22%
3/5 Wemyssfield Kirkcaldy	20	4	10	7	15%	50%	-	36%	N/A
Bankhead Glenrothes	682	147	364	280	25%	50%	36%	41%	+5%
Fife House Glenrothes	628	120	334	227	20%	52%	39%	36%	-3%
Buckhaven Burgh Chambers	55	17	45	35	34%	75%	-	64%	N/A
Carberry House Leven	42	13	34	26	31%	81%	-	61%	N/A
Cupar County Buildings	160 <sup>2</sup>	28	51	35	19%	24%	30%	22%	-8%

## Appendix 2

### Vacant Property portfolio change since Aug 2023

Removed		
Committee area	Property	Disposal Route
Cowdenbeath	Ore Park (Pavilions, and various structures), Clune Terrace, Glenraig, KY5 8AB	Demolition
Dunfermline	New City House, Edgar Street, Dunfermline, KY12 &EP	Terminated Lease
Dunfermline	Woodmill High School, Shields Road, Dunfermline, KY11 4ER	Demolition
Dunfermline	St Columbas High School, Woodmill Road, Dunfermline, KY11 4UN	Demolition
Glenrothes	Rothesay House, Rothesay Place, Glenrothes, KY7 5PQ	Demolition
Kirkcaldy	Kirkcaldy West PS Nursery (Beveridge Park), Abbotshall Road, Kirkcaldy, KY2 5LZ	Refurbished
Levenmouth	Methilhaven care home, Methilhaven Rd, Methil KY8 3HS	Demolition
Levenmouth	Old Telephone Exchange, Leven Road, Lundin Links, KY8 6AJ	Demolition
North East Fife	Former St Andrews Local Office / Registrars, St Mary, St Andrews, KY16 9UY	Sold

## Appendix 2

### Vacant Property at July 2024

Committee	Property	Current Status
Cowdenbeath	Auchterderran Centre, Woodend Road, Cardenden KY5 0NE	Under offer
Cowdenbeath	Town House, 123 High Street, Cowdenbeath KY4 9QA	Under offer – CAT pending
Cowdenbeath	Former St Andrews Church, John Knox Road, Lochgelly, KY5 9QQ	Retain -Project development
Dunfermline	2 Halbeath Road, Dunfermline, Fife, KY12 7QX	Pending - premarketing
Dunfermline	St Margaret's House, 9 St Margaret St, Dunfermline, KY12 7PE	Retain -Project development
Dunfermline	Former Local Office, Walmer Drive, Dunfermline KY12 7LH	Under offer
Dunfermline	Old Engine House, Main Street, Townhill, KY12 0HA	Pending - premarketing
Glenrothes	Q9-Q11 Queensway Road Glenrothes	Retain -Project development
Glenrothes	Victoria Hall, Main Street, Coaltown of Balgonie, KY7 6HS	Pending – Service decision
Glenrothes	Jessamine Cottage, 89 Woodside Way Glenrothes KY7 5DW	Retain -Project development
Glenrothes	Kinglassie Community Centre, 53 Main Street, Kinglassie KY5 0XA	Pending – Legal issue
Kirkcaldy	Dysart Centre, 43, High Street, Dysart, KY1 2UQ	Retain -Project development
Kirkcaldy	Workshop, 112a, Rosslyn Street, Kirkcaldy, KY1 3AD	Pending - premarketing
Kirkcaldy	St Clair Hall, 258, St Clair Street, Kirkcaldy, KY1 2DB	Pending - premarketing
Kirkcaldy	Former Local Office, 104 - 106 High Street, Burntisland, KY3 9AS	Under offer
Kirkcaldy	The - West Mill Mill Street, Kirkcaldy	Retain -Project development
Kirkcaldy	Dairy House, Mill Street, Kirkcaldy	Demolish
Kirkcaldy	Regeneration Office, 45 High Street, Dysart, KY1 2UQ	Retain -Project development
Kirkcaldy	Former Southerton Lodge Beveridge Park KY2 5LZ	Retain -Project development
Kirkcaldy	St Clair Tavern St Clair Street, KY1 3AD	Retain -Project development
Kirkcaldy	Shop, 188 High Street, Kirkcaldy, KY1 1JW	Retain -Project development
Levenmouth	Former Kennoway Public Convenience (Bishops Court) Kennoway KY8 5LA	Demolish
Levenmouth	Corriemar, Silverburn Park, Leven KY8 5PU	Demolish
Levenmouth	Milton of Balgonie Primary School, Main Street, Milton of Balgonie, KY7 6PX	Pending –Service decision
North East Fife	11-13 St Catherine Street Cupar KY15 4LS	On the market
North East Fife	Gateside Primary School, Gateside KY14 7SZ	Under offer
North East Fife	Kincraig Communication Site, Kincraig Point Elie KY9 1AR	Pending – Lease expiry
North East Fife	Harbour masters office, Shore Gate, Crail KY10 3SU	Under offer
North East Fife	Moonzie Schoolhouse and School KY15 4NL	Pending – Legal issue
North East Fife	Rathillet Primary School, A92 Rathillet , Cupar KY15 4QG	Pending – Legal issue



## Appendix 3

### Disposals and Income Receipts 2023/24

	£
St Andrews Area Office, St Mary's Place, St Andrews	2,505,000
Dunino Primary School, A959, Dunino	129,791
82 High Street, Dunfermline	25,000
Site of Former Benarty Community Centre extending to 2.74 Hectares at Hill Road, Ballingry, Fife KY5 8NN	400,000
Barclay Court, Kirkcaldy	52,000
Former Viewforth High School, Loughborough Road, Kirkcaldy KY1 3DE	125,000
Clatto Reservoir, Fife, KY15 5PH	35,000
Lock Up No 18 Pitcoudie Avenue, Glenrothes, Fife KY7 6RU	1,600
Sites 1 & 2 Lochgelly Industrial Estate, The Avenue, Lochgelly, KY5 9HQ	77,500
2 areas of land adjacent to Faraday Road, Glenrothes, Fife	20,000
<b>TOTAL CORPORATE RECEIPTS</b>	<b>3,370,891</b>

## Appendix 4

### Anticipated future receipts from disposals 2024-2029

	<b>Anticipated receipt</b>
	<b>£</b>
Former John Douglas Home, 081 Golfdrum Street, Dunfermline	100,000
Former Harbourmaster's Office, Shoregate, Crail	15,000
Former School and School House Moonzie	80,000
Admiralty Road, Rosyth	600,000
Crompton Road West, Glenrothes	95,000
Plots 1,2,4,5 & 6 Glenfield Industrial Estate, Cowdenbeath	237,000
Gateside Primary School	110,000
Loanhead Avenue, Ballingry	150,000
<b>TOTAL CAPITAL RECEIPTS 2024-25</b>	<b>1,387,000</b>
Auchterderran Centre, Woodend Road, Cardenden	250,000
Pittencrieff Street, Dunfermline	50,000
Rosslyn Street, Kirkcaldy	37,500
Development Site, Aberdour Road, Dunfermline	562,500
Phase 4, Carden Crescent, Cardenden	75,000
Berry Street, Lochgelly	228,750
Residential Development Site, Approach Road, East Wemyss	142,500
Part of Temple Car Park, Harbour Wynd, Lower Largo	25,000
<b>TOTAL CAPITAL RECEIPTS 2025-26</b>	<b>1,371,250</b>
Commercial Site, Chapel Level, Kirkcaldy	525,000
Urquhart Green, Glenrothes	1,125,000
Woodmill / St Columbus High School Sites (Phased payment)	2,000,000
Carberry Road, Kirkcaldy	375,000
Rothesay House, Glenrothes	400,000
<b>TOTAL CAPITAL RECEIPTS 2026-27</b>	<b>4,425,000</b>
I26, Detroit Road, Glenrothes	330,000
Former Co-op, 018-036 High Street, Dunfermline	75,000
Port Street, Inverkeithing	56,250
Woodmill / St Columbus High School Sites (Phased payment)	2,000,000
Inverkeithing High School Site	2,000,000
<b>TOTAL CAPITAL RECEIPTS 2027-28</b>	<b>4,131,250</b>
Residential Development Sites, East & West Main Street, Glenraig	187,500
<b>TOTAL CAPITAL RECEIPTS 2028-29</b>	<b>187,500</b>

29 August 2024

Agenda Item No. 5

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## Annual Health and Safety Report 2023-24

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**Report by:** Sharon McKenzie, Head of Human Resources

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**Wards Affected:** None

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### Purpose

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To enable ongoing scrutiny, the report updates Committee on Health and Safety activity since the report to the Finance, Economy and Corporate Services Sub-Committee on 26<sup>th</sup> October 2023. The report provides high level information with summary detail.

### Recommendations

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Scrutiny Committee is asked to:

- (1) Review performance and activity for the 2023–2024 financial year.
- (2) Note the progress made regarding improving workforce practices and performance in the organisation and advise on any further activity.
- (3) Endorse continued focus on the priorities identified.

### Resource Implications

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None

### Legal & Risk Implications

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Health and Safety at work is about identification of risk and elimination or management of that risk through control measures. The report identifies key health and safety challenges through 2023/4.

### Impact Assessment

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An EqIA has not been completed and is not necessary because the report does not propose a change or revision to existing policies and practices.

## Consultation

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This report has been shared with the Council Executive Team and the Corporate Health and Safety Strategy Group, which includes Trade Union representation.

Ongoing engagement with key stakeholders will continue to be a feature of the Council's shared commitment to working together.

### 1.0 Background

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- 1.1 This report provides an overview of the Council's health and safety performance during 2023/24. This was another year of change and challenge for Fife Council, we continued to focus our efforts to safeguard the health and safety of employees, clients, and service users across Fife. This annual report focusses on the challenges and achievements of 2023/24.
- 1.2 Fife Council is committed to a positive health and safety culture and continual improvement in its health and safety performance.
- 1.3 Health and Safety has both generic provision at a corporate level and teams with specialist knowledge aligned to service delivery. The HR or 'corporate' Health and Safety Team manages the governance of the Health and Safety function through:
  - The Corporate Health and Safety Strategy Group (CHSSG)
  - Annual Report to Scrutiny Committee
  - Processes agreed by the CHSSG and deployed by Heads of Service
  - Provision of advice and guidance through the Health, Safety & Wellbeing tile on the intranet
  - Attendance and support at H&S Forums
  - First Contact queries and a range of investigations
  - Projects and improvement activity across all directorates
- 1.4 In addition, there is a Team Manager Compliance & Risk (which includes H&S) in Education who is the main point of contact for Education related activity; and a H&S Team Manager and support posts within Place focussed on frontline service delivery. Both positions supplement and compliment corporate processes and guidance where required and provide advice and information relevant to their roles with a similar improvement focus. Given the respective specialisms there is little overlap in practice and collaborative and supportive working with colleagues when required.
- 1.5 During the 23/24 year, the corporate team worked with Services reviewing 8219 recorded incidents and 401 enquiries. The Procedures and Guidance documents were reviewed and updated where required. Focus was also given to Lone Working solutions with an Internal Audit undertaken highlighting improvements made to date and prompting associated procedures and guidance document reviews and communication across the services.

## 2.0 Priorities and Continuous Improvement

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### 2.1 Driving at Work

2.1.1 The rollout of the DAVIS system was completed, except for Education Services who continue to undertake a manual checking process. Activities moved to the Shared Service Centre from 1 April 2023 and compliance checking is monitored by the HR Health, Safety and Wellbeing Team (the HSW team).

### 2.2 Violent Marker System

2.2.1 The Violent Marker System (VMS), holds the addresses of individuals that may put employees at risk during home visits or remote working. This is managed by a cross-service Violent Marker Review Group (VMRG) who ensure referred incidents are considered and to ensure named individuals added to VMS are advised. Risk is minimised by adhering to instructions on the VMS and other control measures such as Lone Working procedures (including individual use of a fob) and risk assessments.

2.2.2 The HSW team continued to review and refer incidents to the VMRG. Greater awareness raising and communication has been undertaken by Health and Safety Advisors across all Health and Safety Forums to encourage use of the VMS with the increase in recorded addresses, from 47 at the start of the year to 107 at the end, evidencing that as a success. A digital development request to automate the transfer of flags from other systems to maximise information is following the Data Protection Impact Assessment process and project arrangements with BTS and we anticipate this project to be concluded by March 2025.

2.2.3 With increasing levels of violence, aggression and threat being reported, awareness and safe personal safety practice is important, as is the use of the Lone Worker fobs. Elected Members can use a Lone Worker fob and can also contact Legal and Democratic Services before undertaking home visits who will access relevant information on the VMS on their behalf.

### 2.3 Lone and Remote Workers

2.3.1 There are 3,431 Lone & Remote Working Fobs now allocated across Fife Council. Almost half responded to a survey in November 2023 to confirm personal details and fob assignments. Work is still ongoing to update escalation protocols and team hierarchies across the council.

2.3.2 An update to the GPS software in the fob devices was rolled out by Total Mobile, the device provider, in summer 2023 and progress with this is good, but not yet complete.

2.3.3 Fobs are issued but not always fully used. The table below highlights the increase of usage of the fobs.

Year	No. of active fobs	No. of days fobs have been used	Avg Annual usage per active fob
22/23	1553	55,400	35.7 days
<b>23/24</b>	<b>2668</b>	<b>116,127</b>	<b>43.5 days</b>

Although the increased use is a step in the right direction, opportunity still exists to improve fob usage across all Services/Directorates. It should be noted there has been no recorded use in the past 12 months for approx. 700 devices which is under review.

- 2.3.4 Several training/information sessions have been held with users and managers in relevant services to enhance user confidence and knowledge of the functionality of the fobs as well as showcasing management tools available to monitor device use. Online user and manager training remains available from the provider.
- 2.3.5 Audit Services were requested to conduct a review into the effectiveness of the working practices and procedures across Children & Families, Housing, and services in HSCP. The recommendations have been actioned by the services and the learning shared with all users.

## **2.4 Fire Safety**

- 2.4.1 Fire safety continues to be managed across our premises through a prioritised fire risk assessment programme, periodic reviews, maintenance of precautions and staff training, ensuring compliance with the Fire Scotland Act 2005.
- 2.4.2 Our new insurers, AIG, carried out a Risk Improvement Survey of 10 high value premises, including 7 high schools. Findings indicated a high standard of fire safety prevention and property protection, with some areas for improvement.

Areas for improvement focussed on:

- increased fire watch times for Hot Work (corporate permit and procedures have been updated to include extended fire watch on completion of hot works).
- Inclusion of Thermographic Inspections as part of fixed wiring inspections (Risk Management and Property Services reviewing requirement with AIG).
- Improved Housekeeping and removal of combustibles in electrical cupboards. Premises have confirmed areas cleared and monitored to prevent future build-up of material.

Risk improvement actions are tracked and reported back to AIG by Risk Management.

- 2.4.3 From 1st July 2023, the Fire Service stopped attending automatic fire alarm (AFA) call outs to commercial business and workplace premises. The Fire Service continue to attend all call outs to domestic and residential premises.
- 2.4.4 Extensive preparation, including updated Fire Evacuation Procedures and refreshed Fire Warden training for nominated staff, led to a successful launch.

There is now a 'call challenge' when the Fire Service control room operators ask anyone who reports a fire alarm to check whether there is an actual fire or signs of fire before they send the nearest resource. If a fire alarm is activated by more than one process (e.g. smoke plus heat detector rather than just smoke detector), the alarm will be considered a 'confirmed fire' and the Fire Service will attend.

Recognising the benefits a 'confirmed fire' process in reducing the strategic risk to council premises of a potential delay in responding to a fire in buildings a pilot with 5

Primary Schools with different fire alarm panels successfully tested the 'confirmed fire' signal process. To reduce the risk, Property Services are investing in a prioritised programme of upgrading fire alarm panels to provide a 'confirmed fire' signal.

- 2.4.5 Additional preparatory actions included - "Getting Ready for Call Challenge" guidance to premises managers; verifying premises details with our Alarm Receiving Centre provider; an internal process for recording false alarms and a review of handover to out-of-hours arrangements in schools to reduce risk of unanswered alarms.
- 2.4.6 Under reporting of false alarms continues to be an issue, hampering efforts to reduce the impact of these incidents. The Corporate Fire Safety Management Group continue to support Services and monitor the effectiveness of procedures.
- 2.4.7 Tower Block Review Group continue to oversee a programme of fire safety improvements with the focus on upgrading outstanding private owners' flat entrance doors, fire stopping to compartmentation, and building fire safety information. Ground floor sprinkler installation system programme is progressing with systems now installed at all three Ravenscraig blocks and Swan and Memorial Court blocks.
- 2.4.8 Retirement/Very Sheltered Housing have instigated a Fire Safety Group to coordinate implementation of fire risk assessment action plans, including upgrading fire doors and compartmentation, and a review of fire safety plans. This was following publication of updated fire safety guidance from Scottish Government.
- 2.4.9 As part of ongoing works to improve fire safety at Swan and Memorial Court, an assessment by consultant fire engineers found the External Wall Insulation (EWI) added in 2012 does not meet new fire safety standards in terms of combustibility and represents an increased risk of fire spread. Following the subsequent review of fire safety, various actions were undertaken to ensure resident safety whilst awaiting the precautionary replacement of the existing EWI scheduled for May 2024.
- 2.4.10 Housing, Emergency Resilience and Corporate H&S participated in a multi-agency exercise workshop evaluating emergency response and resilience arrangements for fire resulting in a full evacuation of Swan or Memorial Court tower block. The learning and findings are to be made available to multi agencies partners with affected buildings.

## **2.5 Manual Handling (People and Inanimate Loads)**

- 2.5.1 Manual Handling training and Display Screen Equipment assessments are activities that prevent the occurrence of musculoskeletal disorders, which account for around a third of absences. During 2023/24, there was a continued focus on supporting services across both areas.
- 2.5.2 The Moving and Handling Team and a network of Manual Handling Trainers continue to manage and deliver mandatory training courses utilising eLearning and classroom-based learning to those staff who are involved in manual handling tasks. The type and number of sessions delivered are covered below which evidence increased training for 2023/24.

## Moving and Handling People

Year	2022		2023	
Course Title	No Courses	Uptake	No courses	Uptake
M&H Foundation	46	206 (75%)	89	464 (86%)
M&H Small Children	16	101 (70%)	18	138 (85%)
M&H Linkworker	4	36 (100%)	4	36 (100%)
M&H Competency	9	45 (83%)	10	74 (89%)
M&H Skills Update	13	75 (96%)	16	140 (95%)

- 2.5.3 Moving & Handling Foundation training remained a priority through 2023 focused on reducing waiting times for training to two weeks. This was achieved by a doubling of this offering allowing 464 staff to attend this one-day training. Approximately 70 staff failed to attend training. The names of staff who failed to attend within each service are now highlighted to relevant managers and supervisors.
- 2.5.4 Demand for Moving & Handling Small Child training continues to increase. Two additional courses were added to meet this growing demand from the impact of the extension of nursery provision, as well as a concerted effort to promote the requirement for moving and handling training in mainstream schools.
- 2.5.5 The delivery of Foundation training has continued to increase over 2023, with six new Keytrainers (who are in-service moving and handling trainers) being added to the trainer pool. Another Keytrainer course is scheduled for summer of 2024, meeting growing demand for training, and replacing Keytrainers leaving the Council.
- 2.5.6 Moving & Handling Linkworkers ((who are in-service assessors of moving and handling providing monitoring and supervision) reduced over 2023 from 333 to 280 due to staff turnover. A managed waiting list for spaces has been created as several services failed to nominate staff for this training. Training only runs four times a year therefore those who are a priority will be allocated space in the first instance.
- 2.5.7 Linkworkers completing mandatory annual Update training continues to be a challenge. With 88 staff out of a total 280 Linkworkers being out of date. Managers are made aware of non-compliance twice a year. This warrants an initial improvement in compliance, but this is not always sustained. Linkworker update training allows Fife Council to monitor competence for those staff carrying out moving and handling risk assessment, ensure they are made aware of any relevant information e.g. learning outcomes from incidents and that they are competent to carry out on-site competency assessments for care staff. Linkworkers being out of date exposes Fife Council the risk that a safe system of work may not be suitable and sufficient or that a vital piece of information which could reduce



the likelihood of an accident or incident is missed. Further work to improve attendance is underway.

- 2.5.8 Manual Handling training for some services for object handling was identified as an improvement to ensure compliance with the manual handling regulations for initial and refresher training. Health, Safety and Wellbeing workforce development officers continue to support delivery of manual handling training in conjunction with in-service manual handling assessors to increase the rate of compliance.
- 2.5.9 The Corporate Health and Safety Strategy Group (CHSSG) initiated a training subgroup in January 2024 which is focussed on all required mandatory H&S learning and the sharing of resources and best practice across and within services to monitor and improve training compliance. This work is in the early stages and will report to the CHSSG where required.



## 2.6 Display Screen Equipment (DSE)


- 2.6.1 The interim process for DSE homeworking initiated in 2020, and supported by temporary COVID funding, continued into 2023/24 with HR providing ongoing advice with DSE set up to employees working at home and managers responsible for reviewing and authorising DSE blended working requests. Most office-based staff have elected to move to a Blended Workstyle contract which balances business need to meet face-to-face with continued opportunities to work at home.
- 2.6.2 From 1 April 2024 scrutiny of DSE applications, including ensuring appropriate homeworking set up, will be undertaken by DSE advisors within services, following detailed guidance.
- 2.6.3 DSE eLearning continued to be promoted throughout 2023/24 with employees reporting DSE issues through First Contact. Managers are made aware of issues raised by their staff and then, if required, can access H&S advice to resolve issues.
- 2.6.4 Services are encouraged to ensure they have sufficient DSE assessors to ensure they can cope with their turnover of Blended Working requests. Health, Safety and Wellbeing continue to offer DSE courses to ensure Services have sufficient assessors.
- 2.6.5 Managers continue to ensure that where a blended working application does not satisfy the requirements under DSE arrangements that the employee must be asked to work from their Fife Council workplace until the DSE workstation requirements are satisfied.

## 3.0 Health and Safety Risk Management







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- 3.1 Incidents reported through the First Contact incident reporting software, Assyst, are reviewed by the Health and Safety team. Incident reporting scorecards developed using Power Bi enable up to date reports for Directorates/Services to facilitate trend analysis. The Key to the arrows in the following charts in section 3 are as follows.








Increase on previous year	
Reduction on previous year	

No Change on previous year	
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3.2 The table below shows all Health and Safety incidents reported by Directorate, highlighting a 29% increase in reporting.

ALL Incidents by Directorate	2019-20	2020-21	2021-22	2022-23	2023-24	Trend
COMMUNITIES	228	80	136	199	287	
EDUCATION & CHILDREN	2758	1307	2519	4992	6616	
PLACE	433	262	298	330	368	
FINANCE & CORPORATE SERVICES	43	10	9	15	13	
HEALTH & SOCIAL CARE	1180	840	804	814	934	
<b>Grand Total</b>	4642	2499	3766	6350	8219	







3.3 The table below shows the same incidents by reporting Category. The main increases for 2023/24 were within Violence and Aggression or Threat 35%, Near Miss and Property Damage 24% and Injury or Harm 14%. The increase in Violence and Aggression is covered in more detail in section 3.8. All incidents are thoroughly investigated, and any identified learning shared where required with the aim to prevent recurrence.

ALL Incidents by Category	2019-20	2020-21	2021-22	2022-23	2023-24	Trend
DANGEROUS OCCURRENCE	2	1	1	1	3	
DEATH	1	4	1	0	0	
INJURY OR HARM	1577	1016	1280	1540	1755	
NEAR MISS/PROPERTY DAMAGE	373	232	263	296	366	
OCCUPATIONAL DISEASE	N/A	46	7	2	4	
VIOLENCE, AGGRESSION OR THREAT	2689	1200	2214	4510	6088	
<b>Grand Total</b>	4642	2499	3766	6350	8219	

3.4 The table below shows DSE enquiries reported by Directorate, a 27% decrease in employees reporting a need for assistance on DSE equipment. This indicated an increasing understanding of the importance of a correctly set up workstation for long term health combined with services now having embedded DSE assessors to manage the blended working arrangements with managers and supervisors, resulting in less reliance on corporate Health and Safety intervention.

DSE Enquiries	2019-20	2020-21	2021-22	2022-23	2023-24	Trend
COMMUNITIES	8	11	16	32	24	
EDUCATION & CHILDREN PLACE	8	11	24	27	24	
FINANCE & CORPORATE SERVICES	16	37	18	42	27	
HEALTH & SOCIAL CARE	46	25	42	46	28	
Grand Total	7	20	16	40	33	
	85	104	116	187	136	

3.5 The table below shows Health and Safety (H&S) enquiries where Services have requested assistance on a H&S matter. A 46% reduction should be positive, indicating supervisors and managers are progressing issues themselves. It might also be supervisors making direct contact with someone they know rather than logging a call through First Contact. Further reductions for 2023/24 are attributed to the bulk of Occupational Health Information Online (OHIO) information requests no longer included in this total.







H&S Enquiries	2019-20	2020-21	2021-22	2022-23	2023-24	Trend
COMMUNITIES	37	32	57	49	31	
EDUCATION & CHILDREN PLACE	136	202	194	124	77	
FINANCE & CORPORATE SERVICES	82	53	100	73	32	
HEALTH & SOCIAL CARE	91	33	155	130	72	
Grand Total	141	169	181	118	53	
	487	489	687	494	265	

3.5.1 In terms of overall volume, the corporate H&S team dealt with 8219 incidents and 401 H&S Enquiries. Given the need for answers from a trained/competent person and the variety of enquiries received this is equivalent to 32 new items daily over a 5-day working week.

### 3.6 Reportable Incident Reports

3.6.1 Fife Council is required to report more serious accidents and incidents to the Health and Safety Executive under the Reporting of Injuries, Diseases and Dangerous Occurrences regulations (RIDDOR)<sup>1</sup>. We report incidents to employees and members of the public.

3.6.2 This graph relates to employees only. This shows an 8% reduction in reporting requirements from 2022/23.

<b>RIDDOR - Excluding COVID Employee Incidents</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>2023-24</b>	<b>Trend</b>
COMMUNITIES	2	0	1	0	0	
EDUCATION & CHILDREN	22	18	20	30	23	
PLACE	24	19	26	21	31	
FINANCE & CORPORATE SERVICES	0	1	1	0	0	
HEALTH & SOCIAL CARE	5	7	11	28	19	
<b>Grand Total</b>	<b>53</b>	<b>45</b>	<b>59</b>	<b>79</b>	<b>73</b>	

3.6.3 Between 1 April 2023 and 31 March 2024, 73 incidents were reported to the HSE. The breakdown of incident cause is provided in the below table. This is a decrease of 8% of employee related incidents compared to 2022/2023.

<b>RIDDOR - By Category or Cause</b>	<b>2023-24</b>
SLIPPED, TRIPPED OR FELL ON THE SAME LEVEL	23
VIOLENCE, AGGRESSION OR THREAT	13
HANDLING, LIFTING OR CARRYING ACTIVITY	12
HIT BY MOVING, FLYING OR FALLING OBJECT	2
SERVICE USER ACTIONS/BEHAVIOUR	1
FELL FROM A HEIGHT	6
OTHER	5
CONTACT WITH ELECTRICITY OR AN ELECTRICAL DISCHARGE	2
HIT SOMETHING FIXED OR STATIONARY	4
OCCUPATIONAL DISEASE	0







<sup>1</sup> RIDDOR is the law that requires employers, and other people in control of work premises, to report and keep records of work-related accidents: which cause death; work-related accidents which cause certain serious injuries (specified injuries); diagnosed cases of certain industrial diseases; and certain 'dangerous occurrences' (incidents with the potential to cause harm).

CONTACT WITH HOT LIQUID/SURFACE	1
CONTACT WITH MOVING MACHINERY	3
EXPOSED TO HARMFUL SUBSTANCE	1
<b>Grand Total</b>	<b>73</b>

3.6.4 RIDDOR On Time Reporting. We continue to work with services to ensure effective investigation and timely reporting of 95% of incidents within the 4-week target period. 86% was achieved within the period. Late reporting is due to a variety of reasons and services are encouraged to ensure initial reporting is undertaken at the time of the incident to ensure supporting Health and Safety advisors can undertake RIDDOR determination and subsequent reporting to the HSE.

















### 3.7 Moving and Handling - Employee Incidents

3.7.1 Lifting and Handling incidents have experienced a 40% increase following the decrease last year. Using poor techniques contributes to cumulative musculoskeletal issues, and related absences, without always being preceded by a specific incident. This highlights the importance of ensuring manual handling training is undertaken within services including initial and refresher training. The CHSSG training sub-group have identified this area of training as a priority for 2024/25.

Lifting and Handling Employee Incidents	2019-20	2020-21	2021-22	2022-23	2023-24	Trend
COMMUNITIES	2	1	1	1	0	
EDUCATION & CHILDREN	8	7	8	5	12	
PLACE	49	35	24	22	22	
FINANCE & CORPORATE SERVICES	0	0	1	0	2	
HEALTH & SOCIAL CARE	29	30	15	17	27	
<b>Grand Total</b>	<b>88</b>	<b>73</b>	<b>49</b>	<b>45</b>	<b>63</b>	

### 3.8 Violence, Aggression and Threat (VAT) – Employee Incidents

3.8.1 As anticipated, after the reduction during the pandemic and reported negative consequences of lockdown and the rise experienced in 2022/23, there has been a further increase of 39% in the number of VAT incidents recorded for 2023/24. Education and Children’s services account for 94% of all recorded incidents. Full reporting continues to be encouraged to help understand the full picture.

<b>Violence, Aggression and Threat Employee Incidents</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>2023/24</b>	<b>Trend</b>
<b>COMMUNITIES</b>	<b>42</b>	<b>17</b>	<b>37</b>	<b>59</b>	<b>102</b>	
Physical	4	2	6	11	33	
Verbal	38	15	31	48	69	
<b>EDUCATION &amp; CHILDREN</b>	<b>1743</b>	<b>744</b>	<b>1409</b>	<b>3457</b>	<b>4809</b>	
Physical	1398	632	1127	2823	3803	
Verbal	345	112	282	634	1006	
<b>PLACE</b>	<b>71</b>	<b>42</b>	<b>55</b>	<b>42</b>	<b>55</b>	
Physical	15	10	20	10	12	
Verbal	53	29	35	32	43	
<b>FINANCE &amp; CORPORATE SERVICES</b>	<b>9</b>	<b>4</b>	<b>1</b>	<b>7</b>	<b>4</b>	
Physical	1	0	0	0	1	
Verbal	8	4	1	7	3	
<b>HEALTH &amp; SOCIAL CARE</b>	<b>277</b>	<b>191</b>	<b>179</b>	<b>178</b>	<b>215</b>	
Physical	237	151	143	130	151	
Verbal	40	40	36	48	64	
<b>Total</b>	<b>2142</b>	<b>998</b>	<b>1681</b>	<b>3743</b>	<b>5185</b>	

### 3.8.2 Reduction of Workplace Violence

Reducing workplace violence continues to be a key focus within Fife Council and is an area identified as a Health and Safety priority. Recorded incidents experienced an increase during the year as can be seen in the above table with 94% occurring within Education and Children services.

3.8.3 Within Education and Children's Services the short life working group established in 2022/23 has now been embedded within the Relationships and Behaviour Strategy Group. A comprehensive action plan was developed, and the actions are either complete or progressed well throughout 2023/24. The Education Service staff, with responsibility for the actions, meet regularly to review and update the plan. This ensures

the momentum is maintained. The Action Plan is a standing item on the Relationship and Behaviour Strategy Group agenda.

3.8.4 Following the reports to Education Scrutiny in March 2023 an update was provided in November 2023 ([Agenda Pack for Education Scrutiny Committee 14th November 2023 \(fife.gov.uk\)](#)). A further report will be taken to Education Scrutiny in September 2024.

3.8.5 The Education Heads of Service are holding cluster Wellbeing Roadshows in April and May 2024 for all staff. Supporting staff with Violence and Aggression will be a key theme of these roadshows. This will help disseminate the outcomes and key objectives which the Relationships and Behaviour Strategy group are delivering:

- Providing clarity on how and when to report incidents of violence and aggression.
- Consistent approaches to reporting violence and aggression across all teams.
- Supporting managers to provide feedback to staff who report an incident of V&A
- Monitoring data to determine the level of the incident being reported and the teams reporting those incidents.
- A consistent approach to the level of training that should be completed by each team across the Directorate.
- Targeted approaches to 'additional' training for those most in need
- Developing robust guidance on implementing effective relationships and behaviour policy







3.8.6 The sessions will also include awareness raising of how to use the Intranet to access information in relation to Relationships and Behaviour and Health, Safety and Wellbeing. A Relationships and Behaviour tile has been developed to support staff to easily access the policies and guidance and key documents developed to support teams in schools to manage pupil behaviour. It is sectioned into the following areas:

- Promoting positive Behaviours
- Managing Incidents and Risk
- Serious Incidents and Exclusions
- Core Professional Learning
- Physical Intervention
- Reporting Incidents

3.8.7 There is also a focus in both the Education Health & Safety Forum and Relationship and Behaviour Strategy Group in terms of the Health and Safety responsibilities we have for our employees.

### **3.9 Slips, Trips and Falls - Employee Incidents**

3.9.1 This table highlights a 1% reduction in Slip, Trip or Fall incidents on the previous year. There is no single incident cause within this category. Slips can be a result of wet surfaces (flooring/grass), food residue, ice, and other environmental factors. In each case, the incident was reviewed, and corrective action taken where required to prevent a recurrence.

Slip, Trip, Fall Employee Incidents	2019-20	2020-21	2021-22	2022-23	2023/24	Trend
COMMUNITIES	10	7	2	3	5	
EDUCATION & CHILDREN	57	38	62	70	65	
PLACE	61	57	52	45	56	
FINANCE & CORPORATE SERVICES2023/24	10	3	2	1	1	
HEALTH & SOCIAL CARE	32	37	32	57	47	
<b>Grand Total</b>	<b>170</b>	<b>142</b>	<b>150</b>	<b>176</b>	<b>174</b>	

### 3.10 Accident Investigation and Reporting

3.10.1 All specified injuries and dangerous occurrences should have an investigation report completed within 4-weeks. Because a thorough investigation is also of importance, we aim for 95% to be completed within 4-weeks. CHSSG review late reporting and the team, work with services to understand delays and improve timescales. The investigation time within Education can be affected by availability of staff over school holiday periods.

### 3.11 Employer's Liability Claims

3.11.1 Although the cost of claims is a performance indicator, it is generally out with the influence of current managers. We aim to reduce accidents and occupational diseases through risk management, but the likelihood of an employee claiming, the claim amount and the historic nature of many claims is driven by a range of other factors.

3.11.2 There was a decrease in the cost of claim settlements in 2023/24 from £722,122 to £331,491 (awards varied from £113,834 for asbestos related disease to £275 related to a slip/trip/fall incident in the back of a works van). As advised in previous years, individual claims vary significantly, which is why a local trend, i.e., at council level, would be difficult to discern for any reason. Some claims are the result of alleged occupational exposure many years ago and resulting ill health effects, like exposure to asbestos, may not manifest until a considerable period has elapsed.

The number of claims closed during the year also reduced from 39 to 26.

Employers Liability Claims	2023-24
<b>Industrial disease - 10 claims:</b>	
Related to asbestos	5
Related to (Hand Arm Vibration Syndrome (HAVS))	2
Related to noise induced hearing loss	3
<b>Claims relating to Incident Cause – 16 Claims</b>	



<b>Moving and handling</b>	3
<b>Slip, Trip, Fall</b>	3
<b>Claims classified as “Other”</b>	1
<b>Related to Musculoskeletal</b>	3
<b>Related to Violence aggression or threat</b>	4
<b>Related to Electric shock</b>	1
<b>Related to Falling object</b>	1
<b>Grand total</b>	<b>26</b>

### **3.12 Health and Safety Executive Enforcement Notices**

3.12.1 Where the Health and Safety Executive find a serious failing in the Council’s management of health and safety; they can serve a:

**Prohibition Notice** – is a situation where the HSE have immediate concerns and will ask for the situation to be made safe, activity stopped, or equipment turned off and isolated until it is made safe. You cannot do anything with this process or activity until the HSE remove the prohibition notice.

**Improvement Notice** – is a formal notice stating that you **MUST** improve the situation and will issue specific objectives for you to take, within a strict deadline. The HSE may revisit to check everything is up to date.

**Notification of Contravention (NOC)** – is a letter explaining and identifying material breaches of health and safety laws, how they have been broken, the required actions and the costs to pay for the visit.

3.12.2 In 2023/2024 Fife Council received three Notices of Contravention, these were all related to the Plant Protection Products Regulations 2020 and occurred across three sites. The contraventions led to the following actions which were implemented to comply with the regulations.

- Review treatment recording procedures.
- Spill kits added to all vehicles transporting Plant Protection Products.
- Fleet of Quad bike spray vehicles to be inspected.



### **3.13 Health and Safety Governance**

3.13.1 During 2023/24, the Health, Safety and Wellbeing Team (HSW) continued to encourage and support services to refresh or develop their Fife Council Health and Safety Management Framework (HSMF) responsibilities (part 1,2 and 3). This includes establishing and reviewing risk Profiles to support and complement the Council’s Risk Assessment process by enabling the identification, evaluation and management of service-specific and service-wide occupational health or safety risks. The HSW team will continue to work with Directorates and Services advising on action plans to address gaps in the management and deployment of the HSMF.

### 3.14 Occupational Health

3.14.1 The annual health surveillance programme continues to operate well with the existing service provider. A change in process, resulting from learnings taken from Covid, has resulted in a reduction of the number of face-to-face appointments required, and subsequently reduced down time within the Services.

3.14.2 The figures in last year's report showed a high number of staff failing to attend scheduled appointments. A process was developed and implemented in October 2023 to track these appointments with a view to understanding, and where possible, resolving the reasons for cancellation or non-attendance. Early indications are positive with a significant reduction in numbers evident compared with last year and in particular the Q4 period (Q4 2022 – 46 Q4 2023 – 15).

APPOINTMENTS	2022-23	2023-24	Trend
Attended	1706	1531	n/a as required
Cancelled	12	12	
Failed to Attend	181	100	

### 3.15 Stress Management

3.15.1 Stress isn't the same as pressure, which can be a positive force if managed well. Stress is an adverse reaction to excessive pressure or other types of demands which can cause physical or psychological harm leading to ill-health.

3.15.2 Fife Council has the same commitment to managing and mitigating the psychological risk of workplace stress as it does to other occupational health and safety risks. In addition to referencing in task risk assessments, there is guidance for employees and managers on preventing stress (causes of stress at work, manager responsibilities and using the HSE's stress management standards, Council's individual stress risk assessment and HSE tools). In addition, we have published the organisational risk assessment and a template for Directorate/Service risk assessments with guidance to encourage services to undertake this process.

3.15.3 The stress risk assessment process should be used as a preventative measure, particularly when managing change, consistent with existing policy provision. As change activity starts to take place the expectation is that it will be undertaken using stress tools and thinking and acting with an increasing focus on prevention of work-related stress.

3.15.4 The Stress Overview Group comprising directorate senior managers has a remit to review and agree corporate priorities and actions. Service stress risk assessments continue to be promoted across services to confirm the deployment of existing mitigation controls.

3.15.5 All Directorates were required by CET to complete a Stress Risk Assessment covering all employees by 30th September 2024. This can be at Directorate or Service level and will identify the controls in use to mitigate stress confirming deployment across the service,

with an action plan to remedy identified omissions within 6 months of completion of the Risk Assessment and no later than 31 March 2025. A crucial part of the Risk Assessment exercise is consultation and discussion with staff through teams and H&S forums so that there is feedback to confirm that what has been described in the Risk Assessment is deployed in practice.

### **3.16 Service Reports**

3.16.1 As in previous years, Services were asked to report on their performance during this period and identify successes and areas for improvement. Illustrative examples are included.

3.16.2 In general terms, illustrative pressures in services included:

- Unplanned sickness putting pressure on teams.
- Difficulties recruiting to some roles.
- Some increased aggression, particularly Education and Children's Services (ECS) directorate - covered in section 3.8.2 above.
- Releasing staff for training because of staff absences and workloads.
- New regulation for Persistent Organic Pollutants Waste Operations causing operational challenges for Waste operations mixed bulk waste service as this waste now requires segregation.
- Finance and Corporate Services (F&CS) are finding a high degree of Service change combined with legislative change, high volume of work, high level of recruitment and increased levels of sickness absence in various services contributing to additional pressure on staff when delivering work to comply with statutory dates and duties, this can impact other work, including H&S priorities within services e.g. Risk Assessment review, initiating local review of H&S Management Framework, Mandatory H&S training, root cause analysis of localised workplace stressors etc.

3.16.3 Successes included:

- Environment and Building Services (E&BS) Grounds Maintenance (after a Notice of Contravention in 2022), have implemented a new procurement strategy to facilitate a more structured approach to ensure it is compliant with the procurement and H&S Policy regarding the purchase of small plant & machinery.
- E&BS Building Services conducted a full review of the planning, delivery & recording of toolbox talks, this resulted in a consistent approach highlighting the mandatory topics to be delivered. Recording of toolbox talks now entered on each individuals training record on Oracle and SharePoint. Reports are generated monthly to Team Mangers to ensure compliance.
- E&BS Fleet conducted a full 100% review of all Risk assessments and safe systems of work has taken place and signed off by Fleet Team Manager.
- Several services are completing and publishing Health and Safety Management Framework part 2.
- F&CS services all have either completed or have service stress risk assessments underway with action plans being implemented and monitored.

### 3.16.4 Examples of Service Objectives for 2024/25 include:

- Complete and review all risk assessments and risk profiling.
- Complete and review all services' stress RA and action plans.
- Review results of the HSW matters survey and consider required actions for the directorate.
- Consider specific actions to reduce sedentary nature of some work where possible.
- Innovation within E & BS includes the intention to phase out petrol powered long reach hedge cutters and replace with lower vibrating battery power equipment and service are also trialling inclinometers which allow operatives to identify the banking gradient prior to taking ride-on machinery onto these grounds.
- To deliver mandatory Manual Handling and Work at Height training that is specific to the work of Fleet Service operatives.

### 3.17 **Learning and Development**

3.17.1 As highlighted in section 2.5 significant effort continued to be put into people moving and handling training. Face to face courses for Manual Handling and Food Hygiene at both Elementary and Intermediate levels are now planned throughout 2024/25. The teams offer hybrid training where part of the course is completed via eLearning with tutorials or practical sessions where appropriate, or fully face-to-face training.

3.17.2 The Corporate Health and Safety Strategy Group (CHSSG) recognise that failure to undertake H&S training is a risk to the organisation and have this as a standing item at meetings to review progress. Oracle Learn dashboards are scheduled for development which should make information on training compliance much easier for managers to access, with the recently established CHSSG training group also considering required development of compliance reporting for all types of mandatory in-service learning. It is hoped to have a developed working compliance and recording matrix to evidence training requirements and completion as part of this process.

## 4.0 **Continuing and Future Work Priorities**

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### 4.1 **Priorities For 2024-25**

4.1.1 The priorities for the next year are to continue to manage and monitor our health and safety risks. We will have a focus on workplace review visits and supporting Persons in Control of Buildings to audit the health and safety workplace compliance, as this area was particularly impacted during the pandemic. We will also continue our focus on occupational health, safety, and other prevention activities.

### 4.2 **Workforce Strategy – Our People Matter**

4.2.1 Health, Safety and Wellbeing focus of the Workforce Strategy 'Our People Matter' has previously identified priorities of - Stress, Musculoskeletal Disorders (MSD), Violence & Aggression and effective Management of Health & Safety, these have not changed. Work related stress remains a priority as it contributes to, and in extreme cases can cause, poor mental health. It is an appropriate focus as we have a notable

change agenda and change is a recognised cause of pressures to organisations and individuals which in turn has the potential to impact service delivery.

4.2.2 As more detailed scrutiny is through the Corporate Health and Safety Strategy Group, CET and Scrutiny committee, the focus in the OPM for Health and Safety is the strength and maintenance of this governance. The summary data on Our Success Measures for the OPM were assessed as 'green' in terms of RAG status for:

- Regular performance reporting to Corporate H&S Strategy Group by all Directorates
- Annual H&S reporting to Scrutiny Committee undertaken by HR

4.2.3 PowerBi reports with daily updates from incident reporting data are available to all services and presented at each CHSSG meeting. This includes a rolling two-year timeframe using live data to allow easy trend analysis by Directorate/Service and incident type and severity. Service senior managers continue to be encouraged to analyse this information to inform the management of health and safety within each service.

### **4.3 Managing Risk through the Effective Development of Systems**

4.3.1 Over the next year, we will continue to consider how to improve the management and deployment of the systems underpinning those priority areas identified earlier in the report:

- Reduction of workplace violence
- Lone working
- Audit of deployment of Health and Safety Management Framework responsibilities within directorates / services

### **4.4 Digital Solutions Projects with BTS**

4.4.1 The team will be working with BTS colleagues to implement the following digital improvement projects.

4.4.1 H&S Compliance Visits Tool (scheduled by BTS for 2024/25). This digital project is to identify and make available an efficient and effective corporate application that would allow direct entry during compliance site visits, inspections, and audits with a dataflow to be accessed by Power Bi. This is now at supplier demonstration stage.

4.4.2 H&S Consolidation of Safety Warnings (scheduled by BTS for 2023/24). The aim of this project is to share existing risk information across all Services and to all employees, thereby reducing the risk. Due to BTS priorities this has been delayed and is now progressing this year 24/25 Work with BTS is ongoing to gather information from systems across various Services that can be used to build a system that can be accessed and used by all. Once the information is gathered then we should have a clearer picture of the next steps and potential timescales for completion of this work.

## 4.5 Health and Safety Risk Management

4.5.1 Due to previous resource issues within the H&S team some of the activities mentioned in last year's report have not been progressed as we intended. The H&S team is now at full complement, and we now have an opportunity to refocus our attention to supporting services and ensuring compliance with our H&S requirements. Therefore, over the next year our focus will be on:

- Reviewing the implementation of the Health and Safety Management Framework within services as this is the foundation stone upon which health and safety processes and culture are built.
- Reviewing compliance focussing on key areas – Workplace review visits, Persons in Control (Health and Safety Management Framework Part 3 compliance), quarterly workplace inspection completion.
- Analysing the Health, Safety and Wellbeing survey and identifying improvement actions.
- Continuously reviewing deployment of the Fire Safety Strategy.
- Continuing working with services to improve compliance with Health and Safety mandatory training with a focus on developing accurate reports and evidencing required training completed across the organisation.
- Reviewing corporate procedures and compliance with them.
- Developing and promoting e-learning.
- Assisting services with a review of risk profiling and ensuring they have suitable and sufficient task-based risk assessments to support identified hazards and risks.
- Assisting services where required in H&S event investigation to ensure a standard approach is undertaken and learning can be shared across the organisation.

## 5.0 Conclusions

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5.1 This report presents information on key health and safety activities within Fife Council in another year of challenges. Occupational health and safety risks continue to be managed to protect the health and wellbeing of Fife Council employees and those who use our services.

### Report Contacts:

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29 August 2024  
Agenda Item No. 6

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## **PLANNING SERVICES – ANNUAL SERVICE REVIEW REPORT 2023/2024**

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**Report by:** Pam Ewen, Head of Planning & Chief Planner

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**Wards Affected:** N/A

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### **Purpose**

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To present an overview of the Service, detail the service planning, change and improvement work undertaken in 2023/24 and to provide an assessment of performance to inform scrutiny and future service planning.

This report focuses on the planning functions of the Service; the Climate Change functions will be reported to the Environment, Transport and Climate Change Scrutiny Committee in November.

### **Recommendation(s)**

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The scrutiny committee is asked to:

- review the progress and performance of Planning Services for 2023/24 and the activity undertaken in 2024/25 to date;
- note the assessment and improvements identified through the National Planning Improvement Framework assessment (June 2024);
- note the Service planning objectives for 2024/25 and the three-year direction of travel; and,
- consider and comment on the remodelled 'annual service review' report format.

### **Resource Implications**

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There are no resource implications arising from this report.

### **Legal & Risk Implications**

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There are risks in not meeting Best Value requirements that can lead to additional monitoring/audit, external intervention and/or loss of public confidence.

### **Impact Assessment**

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An EqIA is not required as this report does not propose any changes to policies or services.

### **Consultation**

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Consultation is not required as the report does not propose a change to existing policies and practices.

## 1.0 Purpose

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- 1.1 This is the Planning Services Annual Review for 2023-24. It looks back over the previous year and assesses how the service has performed in relation to its priorities and challenges and looks forward to the changes and improvements that need considered next and the Service's priorities for the next 12 months.
- 1.2 In addition, this report summarises the Planning Service's performance and improvement assessment through the new National Planning Improvement Framework.
- 1.3 In the report you will find:
- An overview of the Service's roles and responsibilities;
  - Budget and workforce information to put service delivery into context;
  - The key priorities the Service has been working to and how these relate to the Plan for Fife and council reforms;
  - An assessment of how the service has performed in relation to these priorities;
  - Objectives and themes for service delivery, change, and/or improvement going forward;
  - An overview of the Service's assessment and identified improvements through the National Planning Improvement Framework (June 2024); and,
  - Case studies showing examples of best practice and Service improvement.
- This information is then used to inform annual service planning and the strategic direction of the service over the next three years.
- 1.4 This approach to annual review and reporting is part of the Council's updated public performance reporting and scrutiny arrangements. More information on that and how the Council performs and compares with other local authorities can be found online here [www.fife.gov.uk/performance](http://www.fife.gov.uk/performance)

## 2.0 Service Overview

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### Key role and responsibilities 2023/24

- 2.1 Planning Services is part of the Place Directorate and is established to:
- Deliver a wide range of statutory planning functions including the Local Development Plan, assessing applications for new development, and facilitating place change.
  - Enable economic growth, further community wealth building, and protecting and enhancing Fife's built and natural environment.
  - Deliver some non-statutory planning functions, including planning enforcement.



- 2.2 The Service's strategic approach supports the Plan for Fife and the Council's reform agenda by facilitating new sustainable development to grow Fife's economy, address climate change, and further community wealth building.
- 2.3 The planning function of the Service is responsible for:
- Deliver statutory planning functions, including:
    - Leading the Council's place-based policy and strategy, including the Local Development Plan (the Fife Place Plan), and the Climate Change Strategy and Action Plan.
    - Providing key statutory functions facilitating new development to grow Fife's economy, address climate change, and further community wealth building.
    - Facilitating transformational place-based change, particularly through the 9 strategic development areas.
    - Assessing 3,800+ p.a. applications (statutory and non-statutory) relating to new developments ranging from small householder changes to major expansions. Dealing with some of Scotland's largest and most complex planning applications, listed buildings, and others.
    - Protecting and enhancing the built and natural heritage across Fife is at the core of the Service's work, with 3% of Fife's domestic stock Listed Buildings and 8% in Conservation Areas.
  - Deliver non-statutory functions, including:
    - Planning enforcement
- 2.4 Overall, the planning functions of the Service largely deliver statutory functions.

### **Budget breakdown 2023/24**

- 2.5 The Planning Service's budget overview is set out in Table One below. The substantial expenditure is on staffing. Income is essentially through planning and related applications both statutory and non-statutory. Application income is monitored monthly and can be subject to volatility, for example where there is an economic downturn particularly related to housebuilding.
- 2.6 Budget savings achieved over the past decade have mainly been through staffing reductions particularly over the period 2010 to 2019, as well as an introduction/increase in some discretionary fees to achieve permanent savings.
- 2.7 Budget pressures remain and are mitigated where possible. Pressures relate to new and unfunded duties placed on the Planning Authority through the Scottish Government, in addition to costs of preparing the Local Development Plan. Increasing non-statutory income through our pre-application service assists, to an extent with overall funding. The LGBF report (2021/22) identified that there has been a 26.1% reduction in planning spending in real terms nationally since 2010/11; one of the highest reductions in Council service areas. Further details are provided in para's 3.34/5 below.

**Table One: Planning Services Budget**

	<b>Net Expenditure by Business Area</b>	<b>Provisional Outturn</b>	<b>Variance</b>	<b>Budgeted FTE by Business Area</b>
	<b>23/24</b>	<b>23/24</b>	<b>23/24</b>	<b>23/24</b>
	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>FTE</b>
Development Management	0.206	0.152	-0.055	53.16
Planning Administration	0.145	0.153	0.008	1.00
Climate Change & Zero Waste	0.688	0.584	-0.104	11.00
Policy & Place	1.104	1.148	0.044	17.48
<b>Total Net Expenditure</b>	<b>2.143</b>	<b>2.035</b>	<b>-0.107</b>	<b>82.64</b>

	<b>Gross Expenditure</b>	<b>Provisional Outturn</b>	<b>Variance</b>
	<b>23/24</b>	<b>23/24</b>	<b>23/24</b>
	<b>£m</b>	<b>£m</b>	<b>£m</b>
Employee Costs	4.745	4.534	-0.210
Premises Related Expenditure	0.000	0.001	0.001
Transport Related Expenditure	0.030	0.021	-0.009
Supplies and Services	0.460	0.533	0.074
Third Party Payments	0.202	0.000	-0.202
Transfer Payments	0.000	0.061	0.061
	<b>5.436</b>	<b>5.150</b>	<b>-0.286</b>

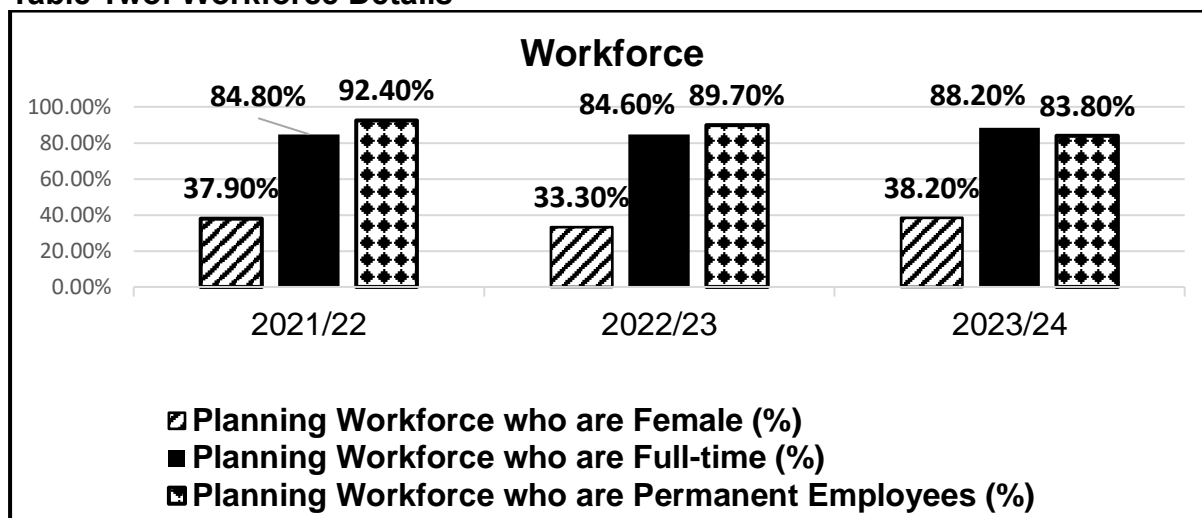
	<b>Gross Income</b>	<b>Provisional Outturn</b>	<b>Variance</b>
	<b>23/24</b>	<b>23/24</b>	<b>23/24</b>
	<b>£m</b>	<b>£m</b>	<b>£m</b>
Internal Income	-0.183	-0.179	0.004
External Income	-3.110	-2.936	0.174
	<b>-3.293</b>	<b>-3.115</b>	<b>0.179</b>

Note – Table One shows the 2023/24 Financial Performance for the whole Planning Service which is reported to 2 scrutiny committees. The financial monitoring of Planning Activities comes under the remit of the Finance and Corporate Services Scrutiny Committee. The financial monitoring of the Climate Change and Zero Waste team comes under the remit of the Environment, Transportation & Climate Change Scrutiny Committee.

## Workforce profile 2023/24

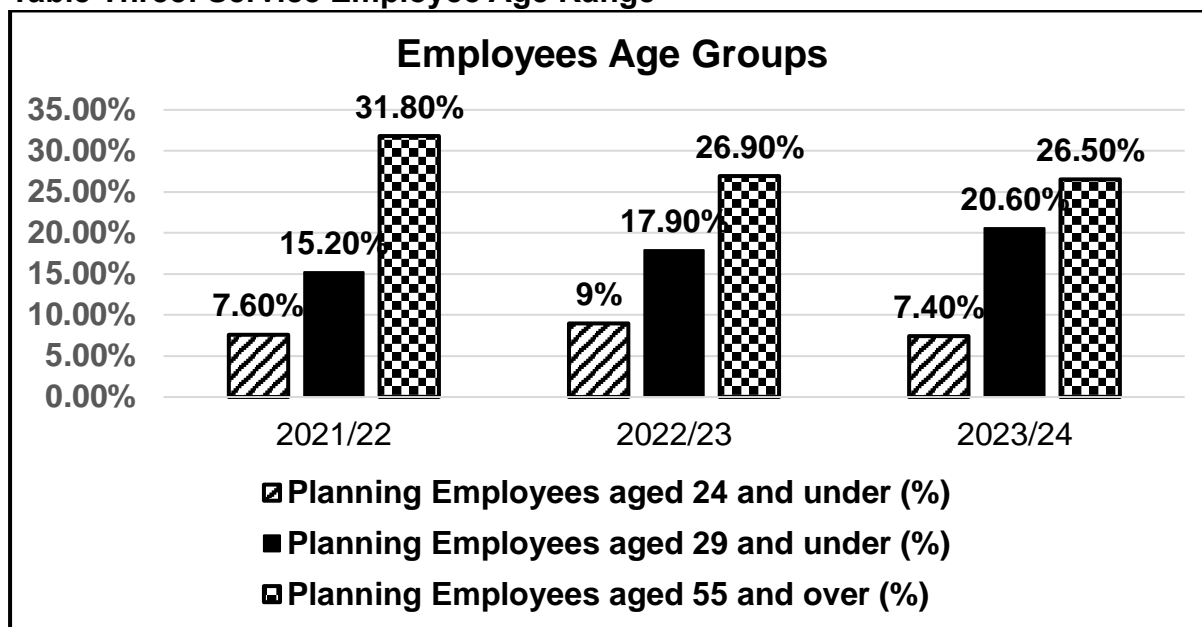
2.8 The workforce comprises 82 full-time equivalent (FTE) roles – employing 87 people in total. Table Two below details some of the key measures of the Service's workforce.

**Table Two: Workforce Details**



2.9 Over the past decade the Service has had a focus on growing staff at an early stage of their career, including students. One of the outcomes from this is a more diverse workforce in respect of age. Table Three below demonstrates that the workforce has a positive age profile, which is the outcome of a decade of workforce strategy.

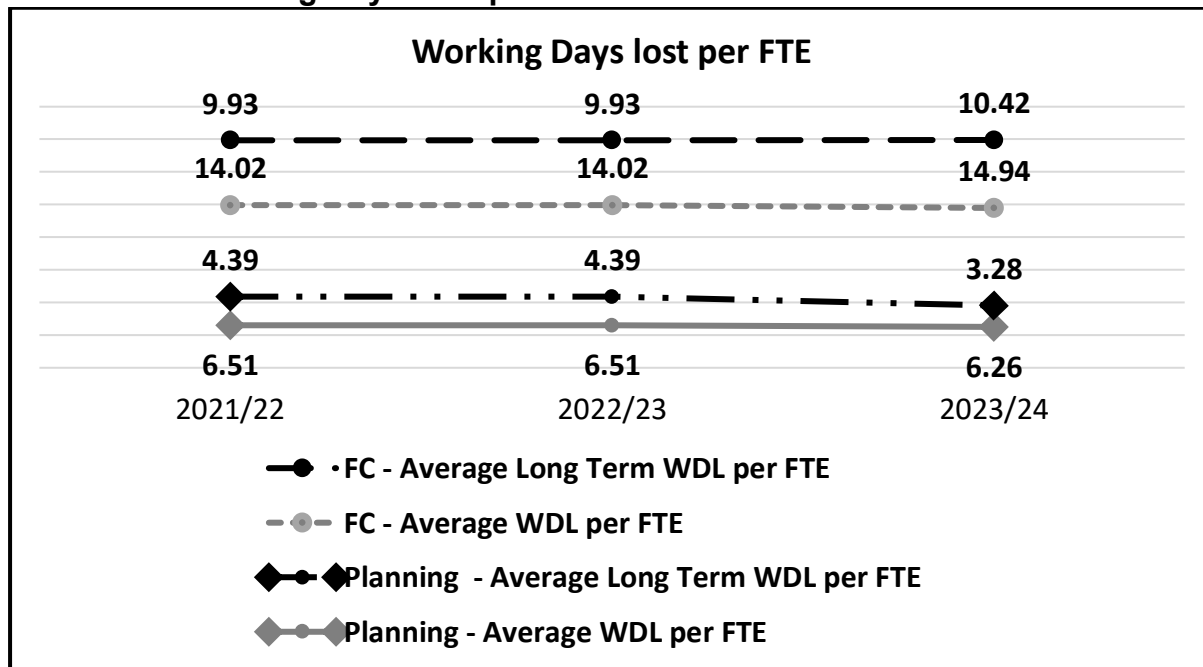
**Table Three: Service Employee Age Range**



\* Note - 29 and under data includes 24 and under

- 2.10 The Service People Plan/Workforce Strategy has created opportunities for a younger workforce, achieved through several routes, in particular the University of Dundee and Fife College. The placements created are a mix of full and part-time; aimed to support students engaged in a course of planning and related study to gain valuable experience, and full-time graduate posts. The Service culture is one where people feel supported. The Service annual staff survey in Sept 2023 showed that 90% of staff were happy at work, and 90% felt supported to develop their skills and knowledge.
- 2.11 Attracting and retaining talented Planners and other professionals into local government is increasingly challenging. The Service is successful in attracting and retaining talented staff. Through recruitment stages promotion of the Service through short videos to convey the values, opportunities and why Fife Council is a great place to work are utilised. The Service's approach to workforce strategy was recognised in a national award in early 2024.
- 2.12 Working days lost in the Service is significantly less than the Councils averages. The Service has a Mental Health First Aider and managers across the Service seek to identify any support that is required for staff at an early stage. Table Four below shows that the average working days lost has reduced. The service will seek to learn from early lessons from the attendance management pilot being led by Human Resources Service.
- 2.13 Priority Four, as set out below, provides more detail on the approach taken and results.

**Table Four: Working Days Lost per FTE**



## 3.0 Priorities and Performance

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### 3.1 Service Priorities 2023/24

The Service had four strategic priorities in 2023/24, to:

1. Progress the review of the Local Development Plan through approval and submission of the Evidence Report.
2. Reduce the time taken to determine planning applications to the national averages.
3. Implement digital changes to enhance customer experiences.
4. Further develop the workforce through regular training, and wider opportunities for early career/student posts.

### 3.2 How we delivered

#### 3.2.1

#### Priority 1: Progressing the Local Development Plan review

##### What we said

We set out to:

Ensure that the Local Development Plan 2, currently being developed, is the Council's corporate place strategy reflecting the Plan4Fife and providing a spatial strategy across the 7 local areas in Fife. A Plan that gains ownership across the Council's Leadership team and across political parties.

##### What we achieved

The first stage, the [Evidence Report](#) was approved by Fife Council on 21 March 2024 for submission to the Department of Planning and Environmental Appeals (DPEA) the Gate Check which is a formal process to essentially check that the Council has all the information required to prepare the proposed Plan, the next stage. Council Services, Fife Partnership partners, Government Key Agencies, such as SEPA, NHS Fife and many other organisations were involved in providing data and information. A range of research was undertaken including Play Sufficiency Assessment, as well as engagement across different community groups.

##### How we know

The Evidence Report was formally submitted the week beginning 29th April 2024; the first Evidence Report to be submitted nationally. The Service is currently responding to the DPEA's request for further information.

### 3.2.2

## Priority 2: Reduce the time taken to determine planning applications

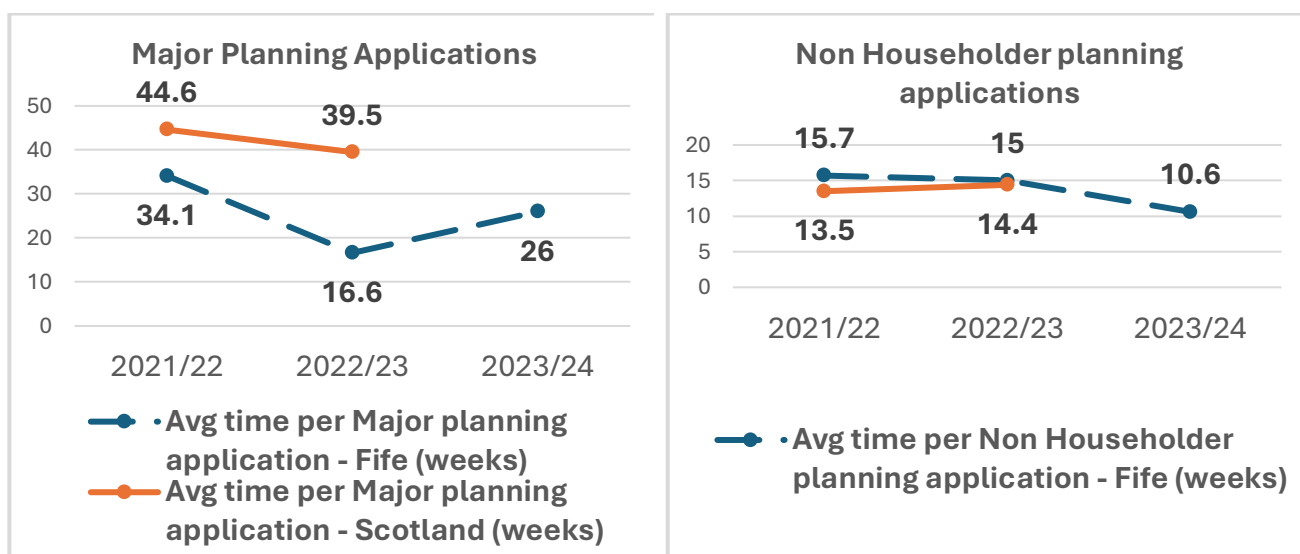
### What we said

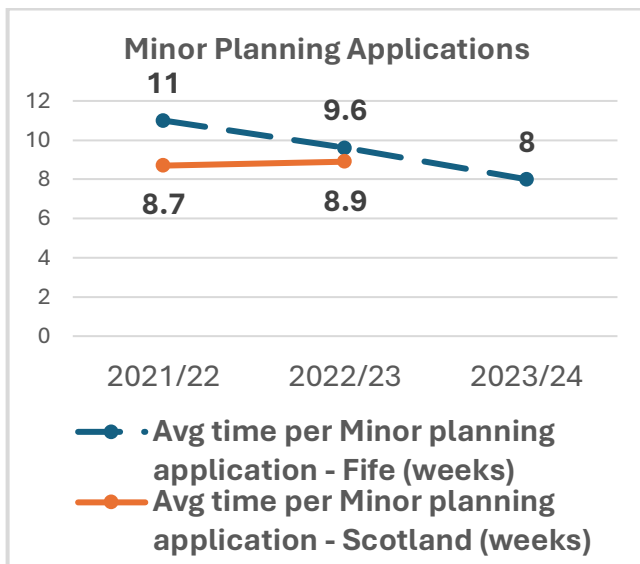
In terms of the average number of weeks taken to determine planning applications Fife Council Planning Services is meeting the timescales it set itself within the previous 2022/23 reporting period. On the back of an increase in planning applications during and on the back of the pandemic, the Service has targeted reducing the time taken to around the national average. In doing so, the service recognises and indeed focuses on achieving a good quality outcome in respect of new development, and often that can take longer to achieve through changes to the development as first proposed.

### What we achieved

Within the Local and Householder categories of applications, the average time taken to determine the applications was reduced. For Major applications, the statistics can vary due to the small number of applications. The service now works to maintain these timescales, with a recognition that the assessment of planning applications is more complex than it has ever been.

### How we know





\* note – Scottish average data for 2023/24 is not yet available from the Scottish Government

### 3.2.3

#### Priority 3: Implement digital changes to enhance customer experience

##### What we said

The Service for many years has been focused on continuous improvement utilising digital tools. The focus for 2023/24 was to continue to make greater use of digital tools and implement improvements based on customer and other feedback.

##### What we achieved

The Service has implemented a range of digital improvements to improve the customer experience as well as more efficient processes. This has been achieved through, for example, increased automation and utilising Power BI. These changes have implemented more detailed monitoring including performance. In some areas of the Service this is from individual level through to team and type of application. This detailed monitoring allows for better informed decisions in areas such as where to focus resources. Sharing this good practice across Planning Authorities is being undertaken. The Service will continue to implement improvements and will require further support from Fife Council BTS colleagues. The focus will be on exploring the potential for AI, further developing automation where possible, and continuously improving the digital customer experience.

Examples of Digital Technology Used by the Planning Service are set out below.

##### Microsoft Teams

Meetings/Delivering Training using hybrid approaches.

##### Power BI

Report dashboard software (weekly list, planning timeline and various reports).

##### Power Automate

Used to automate repetitive tasks (used in our complaints process, weekly list and self-build housing list).

##### Microsoft Forms

Used to gather feedback from customers, used for online engagement for evidence report and in our self-build housing list.

**X** (Formally Twitter) Planning Services account.

### **Uniform Enterprise**

Used to automate email updates to customers.

### **Planning Contact Us forms**

Now capturing new data on customer contact through Power BI and Power Automate.

## **How we know**

Customer feedback has been positive, for example through the Peer review discussion as part of the national performance assessment. Changes to the committee report template for both Planning Committees has been received positively, and was an improvement identified through a LEAN. The Planning Application Timeline Tool which was implemented (see Appendix One) is a further example of improvement for customers, and our customer satisfaction (see Appendix Two) demonstrates a high satisfaction with the service provided; 85% in 2023/24.

### **3.2.4**

## **Priority 4: Further develop the workforce through regular training and wider opportunities for early career/student posts**

### **What we said**

Planning Services would create several routes into the planning profession in Fife by working with the University of Dundee and Fife College.

### **What we achieved**

A new route was achieved through Fife College into both opportunity within planning Service and also into the undergraduate degree in planning at University of Dundee. These routes include a mix of full and part-time positions, the part-time position is aimed at students engaged in a course of study leading to a planning qualification. The Service has also entered into our third year of programme of internships with students from the University of Dundee gaining 30 hours of work experience.

Attracting and retaining talented Planners, environmental and other professionals into local government is increasingly challenging. The Service is successful in attracting and retaining talented staff. Through the recruitment stages, the Service is promoted through short videos to convey the values, opportunities, and why Fife Council is a great place to work. Planning as a career is also featured on the Council's recruitment [webpage](#).

The Service organises and delivers a wide range of Continuous Professional Development (CPD) sessions throughout the year. The CPD series has gained traction over the past 5 years and delivers regular short training sessions on a wide range of topics, and these are open to other Services where relevant. Each team within the Service has an identified training budget. Colleagues are actively encouraged to attend relevant work-related events and provide feedback to colleagues who did not attend. The Service aims for all staff to receive two personal



development appraisals each year. Regular 121 and team meetings also take place to ensure open communication. A no blame culture is also fostered so maximum opportunities are gained to reflect on how well services are delivered and to shape future service improvements through reflecting on and learning from issues that arise.

### How we know

The Service has created several graduate planner placements to support individuals to gain the experience they need to become a chartered member of the RTPI. This is further supported by the service’s lead on an extensive CPD programme which benefits staff across the Place Directorate through which a wide range of subjects were covered including climate change, energy, biodiversity, design over 28 CPD sessions which 1, 645 staff attended (online).

This area of work has also upskilled the Service’s workforce in areas such as mentoring and coaching.

The Service was recently successful in obtaining an award at the Scottish Government’s Scottish Planning Innovation Awards (SPIA)

## 3.3 Wider operational performance

3.3.1 The Service monitors several indicators throughout the year, and this has focused on a national performance framework for planning. Section 4 below sets out an overview of the recent assessment undertaken within the new national planning improvement framework.

3.3.2 Planning is also responsible for 2 Local Government Benchmarking Framework (LGBF) indicators, as shown in Table 5 below.

**Table Five: LGBF Indicators**

LGBF Performance Indicators	2019/20	2020/21	2021/22	2022/23	Status	Long Trend
Cost per planning application (LGBF)	£3,985.32	£4,511.67	£4,653.40	£5,698.23		
Avg Time Per Commercial Planning Application (LGBF)	8.4	11.1	16.9	16.5		

3.3.3 The latest set of LGBF data published covers 2022/23. These two indicators whilst can be helpful to undertake some benchmarking, are not as detailed as the indicators which the Service uses for measuring application processing.

[Explore the data | Benchmarking \(improvementservice.org.uk\)](https://improvementservice.org.uk)

3.3.4 The LGBF report (2022/23) identified that there has been a 26.1% reduction in planning spending in real terms nationally since 2010/11; one of the highest reductions in Council service areas. Nationally there has been a slight growth from 2021/22 to 2022/23 of 2.7%, which reflects the increase in statutory planning fees across Scotland.

3.3.5 In Fife however the reduction in Planning expenditure has been greater than the Scottish average with a reduction of 42.5% of expenditure since 2012 (Scottish average –26.1%). However, there has been an increase in expenditure of 7.2% for the year from 2021/22 to 2022/23, which is greater

than the Scottish average growth for the year (2.7%). This reflects the increase in national planning fees being in part invested into staffing budget to assist with delivering against additional planning duties and managing more complex planning matters.

## 4.0 National Planning Improvement Framework (NPIF)

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- 4.1 A new national assessment of every Planning Authorities' performance and improvement is being implemented, replacing the Planning Performance Frameworks which were in place for 13+ years. The Service was one of ten authorities in the first cohort to implement the new framework. The new approach is one of self-assessment, focused on improvements, and reviewed by a peer review group (which consisted of a range of customers, and Councillors – Planning convenors). The assessment [report](#) provides a comprehensive overview against and sets out improvements which were identified.
- 4.2 The assessment was submitted to the National Planning Improvement Champion, who has since endorsed the report and associated [action plan](#). The improvement actions, together with other identified actions, provide the focus for service improvement in 2024/25.
- 4.3 Case studies have been used within the NPIF report to demonstrate areas of best practice and improvements within the Service during 2023/2024.
- 4.4 Overall, the Service's performance is good and improving in some areas, such as timescales to determine planning applications as set out above. This is against many changes nationally through new planning duties and a much more complex planning system. The focus of the assessment was on identifying improvements to ensure continuous improvement. Some of the key areas include the speed of internal consultations where other Council Services have recruitment challenges in particular professional advisor areas, such as flooding and environmental health. Application validation at point of submission remains about 50% which results in an ongoing cost to the service to manage and work with customers to resolve the issues with their submission. An improvement will look again at further improvements through a LEAN. The detail is set out in para 5.2 below.

## 5.0 Priorities ahead

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- 5.1 The Service will continue to work to implement improvements across all core performance indicators. However, in 2024/25 resources will be focussed on the main change and improvement goals outlined below.
  - To ensure that the Local Development Plan2, the Fife Place Plan provides a spatial strategy across the 7 local areas. A Plan that gains ownership across the Council's Leadership team and across political parties. Working with Community Services, develop a new model for community engagement, and align with Community Planning.

- Provide further leadership and management training across the Service management team over the next 1-2 years, whilst maintaining our regular training opportunities for all.
- Mandatory training for Councillors involved in planning decisions will soon be enacted. The service will deliver the training programme to support Councillors, along with Legal Services.
- To drive greater productivity, increase automation, and improve customer experiences further we need to be more digitally enabled. Maximising the use of PowerBI will continue and will require further support from BTS. Exploring the potential for AI, further developing automation where possible, and continuously improving the digital customer experience.
- Moving from data management to deriving intelligence from information is key to both improving services and changing how we work. There is a strong requirement for spatial analysis using geographic information systems. To accomplish this, upskilling of the workforce in the use of GIS analysis and data management is required.
- Maintaining time taken to determine planning applications at or better than national averages.
- A Service review to ensure the service is structured to meet the need over the medium term. This will include a skills survey. A staged approach over Year 1 (2024/25): Consider options for the re-design to align with the corporate Place approach; Year 2: Consult on draft re-design and finalise; and Year 2/3: Implement re-design.
- Learn from early lessons from the attendance management pilot being led by Human Resources Service.

5.2 The Service will also deliver on the improvement actions as identified through the National Planning Improvement Framework assessment, which are:

- Working corporately to ensure that systems and processes are in place to reduce the impact of recruitment difficulties into specialist services who are critical to determining planning applications.
- Develop and implement a staff skills survey to identify transferable skills to meet aspirations and objectives of a place-based agenda (NPF4).
- Review and prioritise the actions identified in the existing Planning Services' Service Improvement Plan.
- Developing a suite of e-learning modules for local elected members.
- Developing spatial analysis further to inform decision making.
- Training for staff on the use of GIS.
- Horizon scanning of digital solutions which could enhance delivery of the planning service.
- Continue to develop Planning Services' website to include more simplified guidance including video and visual demonstrations to help to reduce the number of invalid submissions.
- New invalid process being scoped out through rapid process improvement event (LEAN) with agents to improve validation rates.
- Continue to develop and improve upon the Planning timeline tool.

- Further develop the Planning Services' customer survey to include selectable key areas (themes) where customers feel their experience fell short.
- Training programme to be developed to improve on how staff communicates more effectively with customers.
- Delivery of training and project work relating to the identification of how Planning Services will meet the Wellbeing and Sustainability objectives set out in NPF4.
- Regularly review new development schemes built on the ground and embed learning and training opportunities.
- Work with Legal Services and associated services to identify opportunities to streamline the Section 75 legal process.

5.3 The service management team recognise that there is a number of improvements to be actioned. This reflects the continuous improvement, which is embedded in the Service, together with the work undertaken to capture and assess feedback from a wide range of stakeholders, as well as decisions and other outputs.

### **Report contacts**

Pam Ewen, Head of Planning & Chief Planner

### **Appendices**

Appendix 1 - Case Study: Planning Application Timeline Tool

Appendix 2 - Case Study: Working with and Learning from Our Customers

Appendix 3 - Case Study: Delivering Sustainable Living and Wellbeing

### **Background papers:**

1. [Fife planning authority National Planning Improvement Framework assessment \(June, 2024\).](#)
2. [Fife Local Development Plan 2 - Evidence Report](#)

## Appendix 1

### Case Study: Planning Application Timeline Tool

#### Context

As part of Fife's continuous improvement work, the Planning Authority found that communication should be key within the Planning System. This does not always seem to be the case throughout the Service and by analysing customer feedback, Planning has identified there are some areas where communication could be improved. During the COVID pandemic and the inability to have a telephone service, this also impacted communication with customers. The Service collated all customer inquiries to find that the majority of these related to getting an update on their planning application. Combined with this, the Service found that most customers found initial communication was good during the validation process of an application, but contact was lost until an application proceeded toward a decision.

Using this data and with the help of digital technology, the Improvement Team in 2021 had an idea of using Power BI to create [a tool](#) that could be used by customers to show exactly where an application is within the Planning system. In addition, the Service could show what has been completed and what is still to be completed. This would help with communication but would enable customers to find out more information on their planning application without the need to contact the Planning Authority directly.

[Fife Council's online planning system](#) has limitations. Although this will show some progress of cases and has recently implemented a simple timeline before the Service could implement anything similar, it does not provide a complete picture. To assist customers and to give them an updated position on their application which can be used in conjunction with the online planning system, the Improvement Team started to map out the stages of an application. From an application that is received, whether it is invalid, any site visits, consultation dates, how the decision will be made (committee/delegated), and the report being started, to a recommendation and the final decision being made.

#### What happened

At the time this project was scoped out the Service employed two Planning Improvement Technicians within the Planning Service. One of them has experience in computer programming and the other has extensive experience working within planning and dealing with complex applications for validation. Both members of staff have experience with dealing with customers daily. This together with customer feedback provided a good base to scope out what was required. During this project, the Improvement Team was expanded with another member of staff who had some planning experience but also some proven ability in using the systems within the Planning Authority. The Service has structured the team to include a Planning Improvement Officer who oversees all improvement projects and allocates work to two Planning Improvement Technicians.

Using Power BI dataflows, the team was able to create a data warehouse to collate some of the Service's data from a case management system – Uniform. This allows the use of this data to create several visualisations and can be coded to provide different data fields and outputs.

Initially, the team had to create a baseline of the main stages of a planning application. As highlighted above, there are many stages that planning applications go through but using some of the fields in our casework system, it is possible to analyse where an application is within the planning process and what else is required to be completed before a decision can be made. By comparing these fields, each stage was scoped within the process as well as a text description which would also be displayed to the customer.

Using each of these stages, custom text was created to give customers details on their application when they enter either an application reference number or an application address using a custom-built user interface. As part of this, a graphical timeline that shows which stages have been completed and what stages are still to be completed is shown below:

### **Areas of collaboration**

The idea of this project came directly from within the Improvement Team. One of the staff had recently completed training in Power BI while analysing the many comments received from our customers who completed the Customer Survey and emails that were received through a central mailbox during the COVID pandemic. The idea was to provide customers with more communication and as much information about their planning application as possible while adhering to Data Protection principles. Using Power BI previously for a new Weekly Update of Development Applications, invaluable feedback was received from a representative of Disabilities Fife regarding accessibility. A User Interface was designed with this knowledge and information in mind. The Tool is also due to be presented at the next Agents Forum to gather more feedback and how it can be improved. A link has also been included to acknowledgement letters for planning applications which are sent when every application is validated.

## **What was the overall result**

[The Timeline tool](#) was published in March and it is hoped that this will help to provide the Service's customers with more information about their planning application while reducing the need to contact the Service and Case Officers directly. The tool also includes a link so customers can contact Planning Services directly using an online form which is also used for customer enquiries. This allows the Service to collate all enquiries together but also to monitor its responses. In the next year, feedback will also be gathered on this while monitoring enquiries to quantify the effectiveness of this piece of work.

Using agile principles and as part of the Service's commitment to continuous improvements, the Improvement Team has already gathered some ideas to expand the Timeline Tool further and upgrade this function by including target dates, the monitoring of extensions of time, amendments received, draft and final sign off dates, and to add a feedback form so customers can also suggest improvements.

## **Lessons Learned**

The Planning Service in Fife invested in the workforce and identified an Improvement Team to be vital so that it is possible to deliver this type of project work. Although staff have knowledge of Planning, the Service has found it to be invaluable to have people who can expand the use of digital tools and systems to help within the Planning process. While Planning Services still relies on the Council's IT Service for some aspects of this, the Service has found that Planning staff who can combine their planning knowledge with various digital skills are crucial to delivering improvements.

Although this was identified early as an improvement, it took a bit of time to design and implement the project. It also involved working closely with colleagues within the IT Service to produce a working prototype that could be published online. At the time Planning Service's workload was high, and this project was delayed for various reasons. On reflection, this could have been completed sooner. Delaying the project meant the team had to keep going back to it and the complexity meant that some of the steps had to be duplicated.

Within this time, the software company that provides the online planning system also delivered a timeline within their Public Access system. Although it is helpful, it does not show as many stages as the Planning Service's Timeline Tool can now display for our customers but there was a risk that this work might have become superfluous.

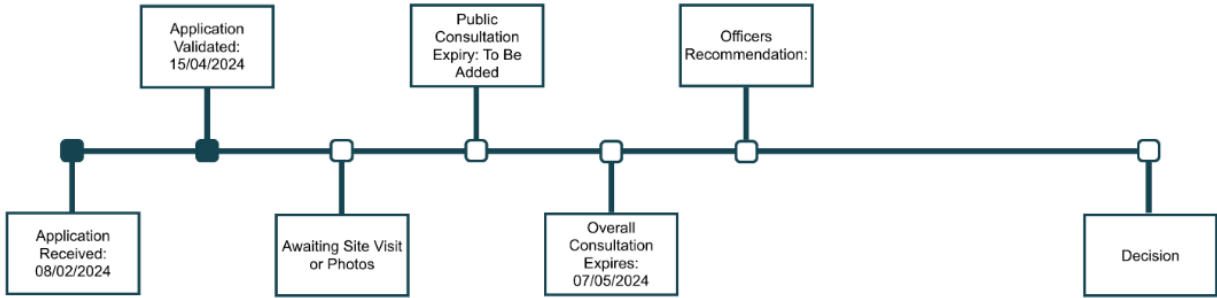
## Planning Application Timeline / Application Details

Application: 24/00321/PPP - Cupar North Cupar Fife

[View Application Details for 24/00321/PPP at `planning.fife.gov.uk`](#)

### Application Status

Your application has been allocated to Steve Iannarelli. You can track your application online by clicking the button above.





## Appendix 2

### Case Study: Working with and Learning from Our Customers

#### Context

Analysis of customer survey feedback 01 April 2023 – 31 March 2024 and comparison to the previous financial year.

#### What happened

From the 1st of April 2023 to the 31st of March 2024 Fife Council Planning Service's Development Management team issued 2606 invitations to its customers, encouraging them to take part in the online survey. The survey includes 13 questions, encompassing a variety of formats including open-ended, multiple-choice, and equality monitoring queries. This approach allows the Service to continually improve its services based on the valuable insights provided by customers.

#### Areas of collaboration

**Key Officer:** Steven Traynor, Planning Improvement Technician

**Stakeholders:** Applicants/Agents, Developers & Authority Other Staff

#### What was the overall result



- 287 Surveys Completed
- 12% Return Rate
- 69% Completed by Agents

#### Overall Customer Satisfaction 2023/24



When comparing the survey results from the previous financial year there is an increase in the number of satisfied customers and a decrease in the number of dissatisfied customers. As can be seen in the tables below representing each of the quantitative questions within the survey.

**Question - Setting aside whether you were happy with the final decision, please indicate how satisfied you were with the overall service you received**

Very Satisfied	Fairly Satisfied	Neither	Fairly Dissatisfied	Very Dissatisfied
40% Increase	22% Decrease	14% Decrease	32% Decrease	33% Decrease

**Question - How Satisfied were you that staff listened and responded to your needs**

Very Satisfied	Fairly Satisfied	Neither	Fairly Dissatisfied	Very Dissatisfied
25% Increase	13% Decrease	3% Decrease	29% Decrease	35% Decrease

**Question - How satisfied were you with the time taken to deal with your application**

Very Satisfied	Fairly Satisfied	Neither	Fairly Dissatisfied	Very Dissatisfied
43% Increase	16% Decrease	58% Decrease	6% Decrease	11% Increase

**Question - How satisfied were you with the updates on the progress of your application**

Very Satisfied	Fairly Satisfied	Neither	Fairly Dissatisfied	Very Dissatisfied
52% Increase	22% Decrease	35% Decrease	38% Decrease	17% Increase

### **What do the results tell the Service**

The data shows that majority of customers have a positive experience when submitting a Planning application to Fife Council and that the Service has seen an improvement from the previous financial year, however, while the infographic paints a positive picture; customers are still highlighting the same issues as previous years suggesting that more work is required to improve in the following areas:

Communication

Clearer guidance

Application processing timescales

### **Communication**

Many customers expressed a desire for better communication, including more updates throughout the planning process, faster responses, and the ability to speak directly with Planning Officers.

### **Clearer guidance**

Customers felt that samples of applications would help with determining what information to submit, while another suggested online video tutorials to assist with the submission process.

### **Application processing times**

Some customers highlighted that the process could be faster and more streamlined. Delays in validation and decision-making being the focus of these comments.

### **Lessons Learned**

The survey is well established and is effective in gathering feedback from customers of Planning Services to highlight key improvements that are required, but the survey needs to be improved upon by implementing ways for customers to select key themes where issues lie to allow better analysis of the data. The feedback shows that the Service is improving each year and that excellent customer care is provided, but more work is needed to fully understand the issues that are impacting the customer's experience.

The specific actions and outcomes from the survey have helped to inform specific improvements for the year ahead and these are set out under the improvements related to Attribute 9.

## Appendix 3

### Case Study: Delivering Sustainable Living and Wellbeing

#### Context

This site located at the edge of the small traditional fishing town of St Monans in the East Neuk of Fife was allocated in the Local Development Plan for residential development. As well as mainstream housing the development required the delivery of affordable housing and the provision of an area for allotments. The provision of allotments within St Monans had been a community asset that had been much sought after for a considerable period of time by the local community.

The scheme includes the provision of multi-use paths to connect with the existing community and the provision of a SUDs basin, landscaping with additional tree planting, and wildflower meadows.

The development integrates 40 affordable houses into the layout of 86 dwellings in a mix of sizes and styles of accommodation ranging from smaller single-storey properties up to 4-bedroom family houses.

In addition to the allocation in the development plan, the provision of affordable housing and the allotments were secured through planning permission through a Section 75 legal agreement.

The negotiations with the developer and close working between Planning Services and the Community Projects Team of Fife Council resulted in the delivery of fully serviced allotments provided with a water supply and wide accessible footpaths. The Council and the community were then able to take forward the detailed layout and delivery of the allotments.

The allotments have been very popular with all plots taken up and there is now a waiting list. The overall development has provided a mixed tenure development that integrates well with the existing community and provides new opportunities for sustainable living both in terms of the allotments themselves but also the wider opportunities provided by a mix of affordable housing provided on the site.





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29 August 2024

Agenda Item No. 7

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## Management of Developer Obligation Funds

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**Report by:** Pam Ewen, Head of Planning Services

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**Wards Affected:** All

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### Purpose

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This report provides an update to the Scrutiny Committee on the review of the process for management of Developer Obligation Funds, which was approved by the Committee at their meeting of 15th June 2023. At that meeting the Scrutiny Committee agreed that Planning Services would lead a review of the process for management of Developer Obligation Funds and examine the options for utilising Historic Developer Obligation Funds.

### Recommendation(s)

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The Scrutiny Committee is asked to note the progress made in implementing the Planning Obligations Review Action Plan and timescales identified for its completion.

### Resource Implications

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The implementation of the Obligations Review Action Plan will involve resource input from Planning Services as the lead Service over the 2024 Calendar year. This requirement will be met within the current Service resource.

A much smaller element of additional resource will be required across Finance, Legal and Democratic Services and the relevant spending Services. It is anticipated that this work will also be accommodated within the existing Services resources.

### Legal & Risk Implications

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None.

### Impact Assessment

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An EqIA is not required because the report does not propose a change or revision to existing policies and practices.

### Consultation

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Monitoring and management of the Planning Obligation Agreements and funds available for spending is supported by Finance and Legal and Democratic Services, who have been consulted on the content of this report.

A number of Services are involved in the delivery of the infrastructure which is to be provided using the funds, including Housing, Transportation, Education, Communities and Corporate Development and Business and Employability.

Representatives of these Services have participated in and contributed to the Planning Obligations Review.

## 1.0 Background

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- .1.1 This report is placed before Finance, Economy and Corporate Services Scrutiny Committee following a request for additional information in relation to Section 75 Funds held by the Council, and the subsequent approval of the recommendation that Planning Services lead a review of the process for management of developer obligation funds at the meetings of this Committee on 26<sup>th</sup> January 2023 and 15<sup>th</sup> June respectively.
- 1.2 The purpose of this report is to update the Committee on the Planning Obligations Review and the progress made in implementing the associated Review Action Plan.

## 2.0 Issues and Options

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### 2.1 The Review Aims and Objectives

- 2.1.1 As set out in the previous report to this Committee, the main aims of the review were to:
  - improve efficiency and reduce resource demands by making better use of digital tools; and,
  - provide greater transparency on how the funds are used for specific projects.
- 2.1.2 Shortly after the commencement of the Review, the Scottish Government feedback report on the annual performance of the Council as Planning Authority highlighted the need to improve on the timescales for negotiating and concluding legal agreements associated with the determination of planning applications. For this reason, an additional aim was then included:
  - to improve the speed of negotiating and concluding planning agreements.
- 2.1.3 In seeking to achieve these aims, the full process was examined from the assessment of the live planning application, through to the physical delivery of the required infrastructure. Whilst it was inevitable that issues with current planning obligations policy and guidance would be raised during the review, these were ruled out of scope, given they are the subject of review through the development plan process.
- 2.1.4 In terms of specific objectives, the Review also sought to achieve the following improvements:
  - enhanced monitoring and delivery mechanisms for both financial and non-financial obligations;
  - greater consistency in the assessment and negotiation of obligation requirements;
  - better communication between the parties involved in the process; and,

- increased visibility of projects delivered through planning obligations.

## **2.2 The Review Process**

- 2.2.1 The review was undertaken using Lean techniques, adapted to suit current hybrid working practices. In essence, this meant the review was led by a core group of Planning Services staff who are directly involved in dealing with planning obligations, with digital tools used for meetings and collaboration. The Service's experience of using digital tools in this way, highlighted the need to ensure the number of participants was kept to a minimum, whilst still including those with a direct involvement in the current process.
- 2.2.2 The planning obligation process from beginning to end is a lengthy one and the first step was to break this down in to four main stages:
- Application Assessment – where the planning application is being assessed and the need to provide additional infrastructure is identified;
  - Decision Reached – where a decision has been made that the planning application can be approved, following the conclusion of a legal agreement;
  - Agreement Concluded – where a legal agreement has been concluded, planning permission is granted and monitoring of the progress of the development on site begins;
  - Obligation Modification – where an application has been received requesting a change to the terms of the legal agreement.
- 2.2.3 All of the Services involved managing planning obligations were asked to identify the issues they experience in the existing process. The existing documented process was then reviewed by a small group of Planning Services staff, cross referencing the identified issues and customer feedback. A draft streamlined process was produced and then further refined through workshop sessions with Finance and Legal and Democratic Services and the spending Services. Following minor amendment to the process maps, widespread support for the new process was confirmed.

## **2.3 The Review Outcomes**

- 2.3.1 There is an agreed new end to end process, which is set out in a process map broken down into the four stages identified in para 2.2.2. The process aims to achieve consistency by providing clear guidance for all parties, whilst also supporting improved communication between the participants in the process. Whilst a reliance on communication through email is unavoidable at present, it is expected that future development in SharePoint combined with PowerBi will provide the means of tracking progress of individual cases across all Services and participants eliminating the need for Services to maintain their own tracking systems.
- 2.3.2 The process seeks to ensure that all participants have the information they need to complete tasks as early as possible, thus reducing unnecessary delays in progressing the delivery of both planning permissions and associated infrastructure. The process also



significantly strengthens monitoring of both receipt of funds and the provision of infrastructure, thereby reducing the risk that the infrastructure will not be delivered.

- 2.3.3 In order to improve performance in terms of the time taken to negotiate and conclude legal agreements, the information needed by Legal Services to commence this work will be requested from applicants earlier than is currently the case. Where it becomes clear that an agreement is likely to be required, the planning case officer will make the request during the assessment of the application, instead of the information being requested by Legal Services after a decision has been made. The planning case officer will also prepare an initial draft of the new standardised legal agreement, ready to be passed to Legal Services at the point a decision is reached on the planning application. The standardised form of legal agreement is available to applicants and other interested parties online to further support speedier conclusion of agreements.
- 2.3.4 Monitoring of the progress of development on site to determine whether triggers for payments or infrastructure delivery have been reached will continue to be carried out by Planning Services. This normally means undertaking periodic checks of individual sites to determine whether the specified number of housing units have been completed. The manual site checking process has been recognised as a source of potential risk and to address this, wherever possible, new legal agreements will incorporate a duty on the developer to provide periodic notifications to Planning Services with respect to the numbers of units completed on a site. It is also proposed that PowerBi will be introduced to automate the process of checking using Council records of housing completions.
- 2.3.5 Whilst the relationship between the impacts of an approved planning development and the use of the funding provided through planning obligations remains at the heart of the process, the role of Planning Services in auditing the use of funds is removed. Instead, details of specific infrastructure project proposals will be approved by Planning Services, allowing budget to be provided to the spending Service on receipt of funds, with normal financial budget monitoring processes ensuring that the funds are utilised for the given purpose. This also makes it easier for Services to align the timing of projects with their capital budget, rather than reclaiming the cost of a project after the work has been completed.
- 2.3.6 The Spending Services will then advise Planning Services of individual project start and completion dates, providing improved monitoring of any relevant dates for the use of funds and enabling confirmation to be passed to developers when their planning obligation funds have been spent. This will also support making more current information available to Members and other interested parties, including the production of periodic reports on the infrastructure delivered through planning obligations.

## **2.4 Planning Obligations Review Action Plan**

- 2.4.1 The Planning Obligations Review Action Plan sets out the tasks to be completed to allow the new process to be implemented. Overall, it is anticipated that the implementation will extend throughout 2024.
- 2.4.2 The provision of clear guidance and training for all participants in the process is key to the successful implementation of any change and the Action Plan sets out the requirement for guidance and training for planning case officers, spending services and

developers. As the planning case officer role is at the beginning of the process (when the need for an obligation is first identified) that guidance is complete, and first stage training has been provided. This will mean that where the need for a new planning obligation is identified, the new process will be engaged. Guidance for spending Services is also complete, with training scheduled for the end of August. This supports the implementation of project approvals and the transfer of budget to those Services on receipt. In addition, subject to project approvals, where existing funds are held budget will also be transferred to Spending Services.

- 2.4.3 Guidance for Developers is also complete, and a new standardised format of Legal Agreement has been drafted. Once the agreement has been finalised both will be published online, and these will support improved performance in terms of the time taken to conclude agreements and improved monitoring of the progress of developments on the ground.
- 2.4.4 The lack of communication between participants at various stages of the old process was one of the most commonly identified issues. Good communication is also key to a successful change programme. Wherever possible, communication in the new process is automated to eliminate the risk of omission and standard templates have been developed and tested and are now available for use.
- 2.4.5 PowerBi reporting is being introduced to eliminate the need for duplication in terms of tracking obligations and to improve the visibility of information about planning obligations and related funds and projects. This is the area where least progress has been made to date, primarily due to the need to access data which will be created by implementing the new process as well as data held in other Council systems.
- 2.4.6 The review of both existing obligation agreements and funds held is in progress. Where triggers for payments have been met, payments have been requested from the developer. Once training has been completed for Spending Services, project approval requests can be processed in relation to existing funds held. The review of funds held has already highlighted instances where specified projects have been completed, but funds have not been requested by the spending Service and these funds are in the process of being transferred to the relevant Services.
- 2.4.7 The review of existing funds also aims to make best use of small amounts of funding where no specific infrastructure improvements have been identified as part of the original planning application process. Where the terms of the original agreements allow, relevant Council or for community projects will be identified which benefit communities in the vicinity of the original planning development. However, in some cases funds will need to be returned to the relevant developer.

## **2.5 Next Steps**

- 2.5.1 The development of PowerBi reports which access information from different electronic systems will be delivered towards the end of 2024, in order to support monitoring and reporting activity from Q4 2024/25.
- 2.5.2 The review of existing obligations and available funds will be concluded by the end of 2024, allowing for budget to be transferred to spending Services by the start of the new

fiscal year. Where there are no specific projects identified, it is anticipated that work to identify whether the funds can be allocated to appropriate local projects will be completed by the end of the fiscal year.

## 3.0 Conclusions

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- 3.1 The Planning Obligations Review presented significant opportunities for improvements to the process of managing developer obligations. The changes identified and being progressed will bring benefits in terms of the wider availability of more specific information about the obligations and the infrastructure which they deliver. Officers across all the Fife Council Services involved will benefit from the introduction of shared information, streamlined processes, earlier release of funding for infrastructure projects and better communication which is supported by digital tools. In addition, the risk of failure to deliver necessary infrastructure will be reduced, whilst developers will benefit from improvements to the time needed to conclude agreements and enhanced information on how funds have been utilised.
- 3.2 Planning Services will continue to lead the change process to secure implementation of the Action Plan. This will draw on existing resources from within Planning and other Fife Council Services over the next six months.

### Report Contact

Mary Stewart, Service Manager, Major Business and Customer Service, Planning Services

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29 August 2024

Agenda Item No. 8

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## **2023/24 Revenue Monitoring Provisional Outturn – Planning Service, Business and Employability Service**

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**Report by:** Eileen Rowand, Executive Director, Finance and Corporate Services  
Carol Connolly, Executive Director, Place

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**Wards Affected:** All

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### **Purpose**

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The purpose of this report is to give members an update on the provisional outturn financial position for the 2023/24 financial year for the areas in scope of the Finance, Economy & Corporate Services Scrutiny Committee.

### **Recommendations**

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Committee is asked to consider the current financial performance and activity as detailed in this report.

### **Resource Implications**

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None.

### **Legal & Risk Implications**

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There are no direct legal implications arising from this report.

### **Impact Assessment**

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An EqlA has not been completed and is not necessary as no change or revision to existing policies and practices is proposed.

### **Consultation**

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None.

## 1.0 Background

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- 1.1 The purpose of this report is to advise Members of the provisional outturn for the Executive Director, Planning, and Business and Employability Services, for the 2023-24 Revenue Budget, and to highlight the major variances as at March 2024. This is the fifth monitoring report to the Scrutiny Committee for the 2023-24 financial year.
- 1.2 The preparation of the 2023-24 Revenue Budget focussed on applying service underspends, budget realignment and vacancy factors to close the budget gap, and as such no specific savings proposals were approved by the Council as part of the Revenue Budget. There is therefore no requirement to include a Savings Tracker as part of financial reporting for the 2023-24 financial year.

## 2.0 Issues

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### 2.1 Provisional Outturn

- 2.1.1 The provisional underspend for the areas falling under the scope of this committee is (£0.052m). A summary of the 2023/24 provisional out-turn for the areas under the scope of this committee is detailed in Appendix 1. This shows provisional expenditure against budget across the service headings within the Directorate. It should be noted that the balances are extracted from the ledger system and are shown as rounded thousands. This may mean that there are some rounding differences contained within the appendices, but these are immaterial values that do not impact on the overall financial position. The following paragraphs provide a brief explanation of the main areas where there are significant variances (+/-£0.250m) to budgets.

## 3.0 Major Variances

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- 3.1 There are no major variances to report as at March 2024.

## 4.0 Conclusions

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- 4.1 The provisional outturn position for the areas under the scope of the Finance, Economy and Corporate Services Scrutiny Committee is net underspend of (£0.052m) (0.56%).

### List of Appendices

- 1 Provisional Outturn 2023/24 Summary

### Background Papers

None

**Report Contact**

Ashleigh Allan

Finance Business Partner

Finance Service

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<b>BUDGET MONITORING REPORT SUMMARY FINANCE, ECONOMY &amp; CORPORATE SERVICES March 2024</b>					<b>Appendix 1</b>	
<b>PLACE DIRECTORATE</b>	<b>CURRENT BUDGET 2023-24 £m</b>	<b>OUTTURN 2023-24 £m</b>	<b>VARIANCE £m</b>	<b>VARIANCE %</b>	<b>PREVIOUS REPORTED VARIANCE £m</b>	<b>MOVEMENT FROM PREVIOUS REPORTED VARIANCE £m</b>
<b>TOTAL COST OF SERVICES</b>	<b>7.918</b>	<b>7.998</b>	<b>0.080</b>	<b>1.01%</b>	<b>(0.471)</b>	<b>0.551</b>
<b>LESS: CORPORATELY MANAGED ITEMS</b>	<b>(1.507)</b>	<b>(1.374)</b>	<b>0.133</b>	<b>-8.81%</b>	<b>0.000</b>	<b>0.133</b>
<b>SERVICE MANAGED NET BUDGET</b>	<b>9.425</b>	<b>9.373</b>	<b>(0.053)</b>	<b>-0.56%</b>	<b>(0.471)</b>	<b>0.418</b>
<b><u>ANALYSIS OF SERVICE MANAGED BUDGET</u></b>						
PLACE EXECUTIVE DIRECTOR	0.460	0.328	(0.132)	-28.77%	(0.131)	(0.002)
PLANNING	1.455	1.450	(0.004)	-0.29%	(0.177)	0.172
BUSINESS & EMPLOYABILITY SERVICE	7.510	7.595	0.084	1.12%	(0.164)	0.248
	<b>9.425</b>	<b>9.373</b>	<b>(0.052)</b>	<b>-0.56%</b>	<b>(0.471)</b>	<b>0.418</b>

29 August 2024  
Agenda Item No. 9

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## **2024/25 Revenue Monitoring Projected Outturn – Planning Service, Business and Employability Service**

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**Report by:** Eileen Rowand, Executive Director, Finance and Corporate Services  
Carol Connolly, Executive Director, Place

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**Wards Affected:** All

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### **Purpose**

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The purpose of this report is to give members an update on the projected outturn financial position for the 2024/25 financial year for the areas in scope of the Finance, Economy & Corporate Services Scrutiny Committee.

### **Recommendations**

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Committee is asked to consider the current financial performance and activity as detailed in this report.

### **Resource Implications**

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None.

### **Legal & Risk Implications**

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There are no direct legal implications arising from this report.

### **Impact Assessment**

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An EqlA has not been completed and is not necessary as no change or revision to existing policies and practices is proposed.

### **Consultation**

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None.



## 1.0 Background

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- 1.1 The purpose of this report is to advise Members of the projected outturn for the Executive Director, Planning, and Business and Employability Services, for the 2024-25 Revenue Budget, and to highlight the major variances as at June 2024. This is the first monitoring report to the Scrutiny Committee for the 2024-25 financial year.
- 1.2 There were no specific savings included in the preparation of the 2024-25 Revenue Budget, therefore a savings tracker is not required as part of financial reporting for the 2024-25 financial year.

## 2.0 Issues

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### 2.1 Projected Outturn

- 2.1.1 The projected overspend for the areas falling under the scope of this committee is £0.340m. A summary of the 2024/25 projected out-turn for the areas under the scope of this committee is detailed in Appendix 1. This shows projected expenditure against budget across the service headings within the Directorate. It should be noted that the balances are extracted from the ledger system and are shown as rounded thousands. This may mean that there are some rounding differences contained within the appendices, but these are immaterial values that do not impact on the overall financial position. The following paragraphs provide a brief explanation of the main areas where there are significant variances (+/-£0.250m) to budgets.

## 3.0 Major Variances

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- 3.1 There are no major variances to report as at June 2024.

## 4.0 Conclusions

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- 4.1 The projected outturn position for the areas under the scope of the Finance, Economy and Corporate Services Scrutiny Committee is net overspend of £0.340m 4.31%.

### List of Appendices

- 1 Projected Outturn 2024/25 Summary

### Background Papers

None

### Report Contact

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**BUDGET MONITORING REPORT SUMMARY**  
**FINANCE, ECONOMY & CORPORATE SERVICES**  
**JUNE 2024**

**Appendix 1**

PLACE DIRECTORATE	CURRENT BUDGET 2024-25 £m	FORECAST 2024-25 £m	VARIANCE £m	VARIANCE %
<b>TOTAL COST OF SERVICES</b>	<b>5.910</b>	<b>6.249</b>	<b>0.340</b>	<b>5.75%</b>
<b>LESS: CORPORATELY MANAGED ITEMS</b>	<b>(1.984)</b>	<b>(1.984)</b>	<b>(0.000)</b>	<b>0.01%</b>
<b>SERVICE MANAGED NET BUDGET</b>	<b>7.894</b>	<b>8.234</b>	<b>0.340</b>	<b>4.31%</b>
<b><u>ANALYSIS OF SERVICE MANAGED BUDGET</u></b>				
PLACE EXECUTIVE DIRECTOR	0.464	0.464	0.000	<b>0.00%</b>
PLANNING	1.353	1.581	0.228	<b>16.85%</b>
BUSINESS & EMPLOYABILITY SERVICE	6.077	6.189	0.112	<b>1.84%</b>
	<b>7.894</b>	<b>8.234</b>	<b>0.340</b>	<b>4.31%</b>

29 August 2024

Agenda Item No. 10

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## 2023/24 Capital Monitoring Provisional Outturn – Business and Employability Service

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**Report by:** Eileen Rowand, Executive Director, Finance and Corporate Services  
Carol Connolly, Executive Director, Place

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**Wards Affected:** All

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### Purpose

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The purpose of this report is to provide an update on the Capital Investment Plan and advise on the provisional financial position for the 2023/24 financial year for the areas in scope of the Finance, Economy & Corporate Services Scrutiny Committee.

### Recommendation(s)

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Committee is asked to consider the current financial performance and activity as detailed in this report.

### Resource Implications

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None.

### Legal & Risk Implications

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None.

### Impact Assessment

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An EqIA has not been completed and is not necessary as no change or revision to existing policies and practices is proposed.

### Consultation

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None.

## 1.0 Background

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- 1.1 This report summarises the provisional capital outturn for the areas falling under the scope of this Committee for 2023/24. Provisional expenditure is £11.591m, representing 73% of the approved capital programme for 2023/24.
- 1.2 Appendix 1 shows an analysis of specific projects in the current capital investment plan which have a budget greater than £1.000m and analyses total project cost rather than only in year spend.
- 1.3 Appendix 2 details the provisional expenditure against budget for each project, along with any associated income.

## 2.0 Issues, Achievements & Financial Performance

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### 2.1 Key Issues / Risks

- 2.1.1 Appendix 1 details the total cost forecast position for all capital projects within the areas under the scope of the Committee with an overall value of £1.000m and over. The key risks associated with the major projects are noted below.
- 2.1.2 Across the Capital Investment Plan there continues to be risk that both the timing and the costs of projects are adversely affected by the current economic climate. Throughout the programme, issues are continuing to be identified in relation to the supply of construction materials, the consequences of which have been considered and reflected in the Capital Investment Plan review which was approved by Fife Council on 22 June, 2023. Monitoring of the impact of any additional costs on projects still in their infancy will continue and any significant impact on timescales and associated risks will be reported to this committee. Where appropriate, any known impact on timing of delivery of projects has been built in to the rephased plan and the overall scale of any additional costs or further delays has been considered as part of the review of the Capital Investment Plan.

### 2.2 Major Projects – Potential Risks and Actions

- 2.2.1 There are no additional or new risks arising in the current reporting period from any of the major projects being progressed.

### 2.3 Financial Performance – 2023/24 Provisional Outturn

- 2.3.1 Appendix 2 provides a summary of the provisional outturn for each project for the financial year 2023/24. The appendix shows a provisional outturn of £11.591m against a Capital Investment plan of £15.907m, a spending level of 73%. The variance of (£4.316m) is slippage which relates to delays in delivery and projects are still expected to be delivered in full and within budget, albeit over a longer timeframe.
- 2.3.2 Appendix 2 also provides a summary of the provisional outturn for each project for the financial year 2023/24 for capital income. The appendix shows a provisional outturn of £9.907m against a capital income budget of £12.908m.
- 2.3.3 The reasons for significant variances (+/-£0.500m) are detailed in paragraph 2.4.

2.3.4 Slippage is the term used to describe projects that are expected to spend less than the budget allocation in a particular year due to a delay in timing on the delivery of the project. This is not uncommon in the capital programme and the reasons for this can be wide and varied. Advancement is the term used to describe projects that are expected to spend more than the budget allocation in a particular year due to an acceleration of the budget from future years.

## **2.4 Significant Variances**

### **2.4.1 Regeneration, Town Centres – slippage of (£1.083m)**

The main reason for slippage is (£0.707m) at Inverkeithing Town Centre Regeneration project due to delays from complex tenders at this site and at the Town House. (£0.210m) due to land acquisition negotiations at Cupar Inner Court project.

These projects are externally funded and slippage in expenditure results in reduction in grant income claimed in the 2023/24 financial year. This is referenced in paragraph 2.4.4.

### **2.4.2 Place Based Investment Programme (PBIP) – slippage of (£0.888m)**

Slippage was experienced within the Scottish Government funded Place Based Investment Programme (PBIP) of (£0.888m). The PBIP projects which have slipped are ; Dunfermline's city centre Gap Site development (£0.295m) due to delays in finalising designs in order to minimise revenue costs, Public Realm Leven Railway Station (£0.283m) during consultation with Network Rail, Lochgelly Business Park Energy Efficiency (£0.203m) delayed due to available contractor resources and Kirkcaldy Esplanade (£0.132m) as additional budget approved in June 2023 and funded works will be delivered in the current financial year.

These projects are externally funded and slippage in expenditure results in reduction in grant income claimed in the 2023/24 financial year. This is referenced in paragraph 2.4.5.

### **2.4.3 Industrial Investment Programme – slippage of (£1.381m)**

The main reason for slippage is delay at Fife Interchange North where a new contractor for groundworks was required and is now in place, resulting in slippage of (£1.318m). Further slippage of (£0.280m) is a result of delay at Glenrothes Flemington Road project where there had been difficulty in accessing third party premises and delayed responses to requests for information. These issues have been resolved and the project is progressing to the next stage. Underspend of (£0.134m) is a result of planned acquisition which will no longer go ahead this year and funds will be redirected to the final phase of the Fife Industrial Innovation Investment Programme, other underspend of (£0.074m) relates to lower than expected requirement for digital infrastructure across the programme. The slippage and underspend are offset by £0.406m advancement in development of new business units at Levenmouth to maximise external funding available in last financial year.

These projects are externally funded and slippage in expenditure results in reduction in grant income claimed in the 2023/24 financial year. This is referenced in paragraph 2.4.6.

#### **2.4.4 Regeneration, Town Centres – shortfall of £0.769m**

The Inverkeithing Public Realm projects and Cupar Inner Court are funded externally. The slippage in project expenditure reported at paragraph 2.4.1 reduces the level of grant which can be claimed in the 2023-24 financial year, however, this does not reduce the overall funding to the projects and the shortfall will be recovered in future years.

#### **2.4.5 Place Based Investment Programme – shortfall of £1.411m**

The Place Based Investment Programme projects are funded externally. The slippage in project expenditure reported at paragraph 2.4.2 reduces the level of grant which can be claimed in the 2023-24 financial year, however, this does not reduce the overall funding to the programme and the shortfall will be recovered in future years. Other variance relates to income budget overstated as includes projected income relating to PBIP projects which are delivered by the Communities directorate. This will be realigned in 2024-25.

#### **2.4.6 Industrial Investment Programme income – shortfall of £0.723m**

The Industrial Investment Programme is funded by Edinburgh & South East Scotland City Region Deal grant. The reduction in programme expenditure reported at paragraph 2.4.3 reduces the level of grant which can be claimed in the 2023-24 financial year, however, this does not reduce the overall funding to the programme and the shortfall will be recovered in future years.

## **3.0 Conclusions**

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- 3.1 The total 2023/24 approved programme for the areas in scope of the Finance, Economy and Corporate Services Scrutiny Committee is £15.907m. The provisional level of expenditure is £11.591m, which represents 73% of the total programme, resulting in slippage of (£4.316m).
- 3.2 The management of capital resources require us to look across financial years, as well as within individual years. The 2023/24 performance is only a snapshot of the existing plan, and the Directorate will adjust expenditure levels within future years of the plan to accommodate the advancement or slippage of projects.

### **List of Appendices**

1. Total Cost Monitor
2. Capital Monitoring Report

**Report Contact**

Ashleigh Allan

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FIFE COUNCIL  
 FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE  
 PLACE DIRECTORATE - BUSINESS AND EMPLOYABILITY SERVICE  
 CAPITAL INVESTMENT PLAN 2023-33  
 TOTAL COST MONITOR - MAJOR CAPITAL PROJECTS

Appendix 1

Project	Service	Original Approved Budget £m	Current Project Budget £m	Total Outturn £m	Variance £m	Variance %	Current Project Status	Expected Project Completion Date
Fife Interchange Business Units - Phase 1 & 2	Inclusive Growth and Jobs	8.130	11.518	11.518	-	0.00%	Current Project	2024-25
John Smith Business Park Business Units	Inclusive Growth and Jobs	3.644	5.517	5.517	-	0.00%	Current Project	2025-26
<b>Total Major Projects over £5.000m</b>		<b>11.774</b>	<b>17.035</b>	<b>17.035</b>	<b>-</b>	<b>0.00%</b>		
Queensway Development Site	Inclusive Growth and Jobs	2.113	3.399	3.399	-	0.00%	Current Project	2023-24
Dalgety Bay Business Units - Phase 2	Inclusive Growth and Jobs	2.853	3.980	3.980	-	0.00%	Current Project	2023-24
Levenmouth Business Units - Phase 1	Inclusive Growth and Jobs	1.602	3.673	3.673	-	0.00%	Current Project	2024-25
Queensway Refurbishment	Inclusive Growth and Jobs	1.380	4.030	4.030	-	0.00%	Current Project	2024.25
Fife Interchange North Site Servicing	Inclusive Growth and Jobs	3.046	1.511	1.511	-	0.00%	Current Project	2024-25
Levenmouth Business Units - Phase 2	Inclusive Growth and Jobs	2.898	3.135	3.135	-	0.00%	Current Project	2025-26
Kirkcaldy Flexible Business Premises	Inclusive Growth and Jobs	1.686	1.686	1.686	-	0.00%	Future Project	2026-27
Kirkcaldy Esplanade Phase 3	Thriving Places	1.500	1.302	1.302	-	0.00%	Current Project	2024-25
SE Joint Venture - Fife Interchange South	Thriving Places	1.138	2.784	2.784	-	0.00%	Future Project	2024.25
Inverkeithing Built Heritage	Thriving Places	1.176	1.173	1.173	-	0.00%	Current Project	2024-25
<b>Total Major Projects over £1.000m</b>		<b>19.392</b>	<b>26.672</b>	<b>26.672</b>	<b>-</b>	<b>0.00%</b>		
<b>Total Major Projects</b>		<b>31.166</b>	<b>43.708</b>	<b>43.708</b>	<b>-</b>	<b>0.00%</b>		



FIFE COUNCIL  
FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE  
PLACE DIRECTORATE - BUSINESS AND EMPLOYABILITY SERVICE  
CAPITAL INVESTMENT PLAN 2023-33  
MONITORING REPORT 2023-24

Appendix 2

Expenditure	Current Budget £m	Actual to Date £m	Total Outturn £m	Variance £m	Outturn as % of Plan
Regeneration - Town Centres	2.167	1.084	1.084	(1.083)	50%
Regeneration - Other	0.173	0.049	0.049	(0.123)	29%
Business Premises Refurbishment Programme	0.594	0.327	0.327	(0.266)	55%
Growing the Economy	1.010	0.787	0.787	(0.223)	78%
Place Based Investment Programme	1.213	0.324	0.324	(0.888)	27%
Business Property Portfolio	0.128	0.008	0.008	(0.120)	6%
Site Servicing Rolling Programme	-	0.018	0.018	0.018	-
Vacant/Derelict Land	0.992	0.992	0.992	(0.000)	100%
Industrial Investment Programme	9.259	7.878	7.878	(1.381)	85%
Business Portfolio Energy Efficiency	0.266	0.017	0.017	(0.249)	6%
Employability Premises Refurb Programme	0.106	0.106	0.106	0.000	100%
<b>TOTAL BUSINESS &amp; EMPLOYABILITY SERVICE</b>	<b>15.907</b>	<b>11.591</b>	<b>11.591</b>	<b>(4.316)</b>	<b>73%</b>
<b>TOTAL EXPENDITURE</b>	<b>15.907</b>	<b>11.591</b>	<b>11.591</b>	<b>(4.316)</b>	<b>73%</b>

Income	Current Budget £m	Actual to Date £m	Total Outturn £m	Variance £m	Outturn as % of Plan
Regeneration - Town Centres	(1.240)	(0.470)	(0.470)	0.769	38%
Regeneration - Other	(0.050)	(0.050)	(0.050)	0.001	99%
Business Premises Refurbishment Programme	(0.115)	(0.022)	(0.022)	0.093	19%
Growing the Economy	(0.322)	(0.318)	(0.318)	0.004	0%
Place Based Investment Programme	(1.832)	(0.421)	(0.421)	1.411	0%
Vacant/Derelict Land	(0.982)	(0.982)	(0.982)	-	100%
Industrial Investment Programme	(8.368)	(7.644)	(7.644)	0.723	91%
<b>TOTAL BUSINESS &amp; EMPLOYABILITY SERVICE</b>	<b>(12.908)</b>	<b>(9.907)</b>	<b>(9.907)</b>	<b>3.001</b>	<b>77%</b>
<b>TOTAL INCOME</b>	<b>(12.908)</b>	<b>(9.907)</b>	<b>(9.907)</b>	<b>3.001</b>	<b>77%</b>

29 August 2024

Agenda Item No. 11

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## 2024/25 Capital Monitoring Projected Outturn – Business and Employability Service

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**Report by:** Eileen Rowand, Executive Director, Finance and Corporate Services  
Carol Connolly, Executive Director, Place

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**Wards Affected:** All

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### Purpose

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The purpose of this report is to provide an update on the Capital Investment Plan and advise on the projected financial position for the 2024/25 financial year for the areas in scope of the Finance, Economy & Corporate Services Scrutiny Committee.

### Recommendation(s)

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Committee is asked to consider the current financial performance and activity as detailed in this report.

### Resource Implications

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None.

### Legal & Risk Implications

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None.

### Impact Assessment

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An EqlA has not been completed and is not necessary as no change or revision to existing policies and practices is proposed.

### Consultation

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None.

## 1.0 Background

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- 1.1 This report summarises the projected capital outturn for the areas falling under the scope of this Committee for 2024/25. Projected expenditure is £16.096m, representing 100% of the approved capital programme for 2024/25.
- 1.2 Appendix 1 shows an analysis of specific projects in the current capital investment plan which have a budget greater than £1.000m and analyses total project cost rather than only in year spend.
- 1.3 Appendix 2 details the projected expenditure against budget for each project, along with any associated income.

## 2.0 Issues, Achievements & Financial Performance

---

### 2.1 Key Issues / Risks

- 2.1.1 Appendix 1 details the total cost forecast position for all capital projects within the areas under the scope of the Committee with an overall value of £1.000m and over. The key risks associated with the major projects are noted below.
- 2.1.2 Across the Capital Investment Plan there continues to be risk that both the timing and the costs of projects are adversely affected by the current economic climate. Throughout the programme, issues are continuing to be identified in relation to the supply of construction materials, the consequences of which have been considered and reflected in the Capital Investment Plan review which was approved by Fife Council on 22 June, 2023. Monitoring of the impact of any additional costs on projects still in their infancy will continue and any significant impact on timescales and associated risks will be reported to this committee. Where appropriate, any known impact on timing of delivery of projects has been built in to the rephased plan and the overall scale of any additional costs or further delays has been considered as part of the review of the Capital Investment Plan.

### 2.2 Major Projects – Potential Risks and Actions

- 2.2.1 There are no additional or new risks arising in the current reporting period from any of the major projects being progressed.

### 2.3 Financial Performance – 2024/25 Projected Outturn

- 2.3.1 Appendix 2 provides a summary of the projected outturn for each project for the financial year 2024/25. The appendix shows a projected outturn of £16.096m against a Capital Investment plan of £16.095m, a spending level of 100%. The variance of £0.001m is advancement which relates to progress in delivery and projects are still expected to be delivered in full and within budget.
- 2.3.2 Appendix 2 also provides a summary of the projected outturn for each project for the financial year 2024/25 for capital income. The appendix shows a projected outturn of £17.481m against a capital income budget of £16.748m.

2.3.3 The reasons for significant variances (+/-£0.500m) are detailed in paragraph 2.4.

2.3.4 Slippage is the term used to describe projects that are expected to spend less than the budget allocation in a particular year due to a delay in timing on the delivery of the project. This is not uncommon in the capital programme and the reasons for this can be wide and varied. Advancement is the term used to describe projects that are expected to spend more than the budget allocation in a particular year due to an acceleration of the budget from future years.

## **2.4 Significant Variances**

### **2.4.1 Industrial Investment Programme income – over recovery of (£0.733m)**

Income on the i3 Programme is projected to advance by £0.733m. This is an increase in projected capital receipts for 2024/25 as progress with the developed site disposal at Fife Interchange is now earlier than expected.

## **3.0 Conclusions**

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3.1 The total 2024/25 approved programme for the areas in scope of the Finance, Economy and Corporate Services Scrutiny Committee is £16.095m. The projected level of expenditure is £16.096m, which represents 100% of the total programme, resulting in advancement of £0.001m.

3.2 The management of capital resources require us to look across financial years, as well as within individual years. The current year performance is only a snapshot of the existing plan, and the Directorate will adjust expenditure levels within future years of the plan to accommodate the advancement or slippage of projects.

### **List of Appendices**

1. Total Cost Monitor
2. Capital Monitoring Report

### **Report Contact**

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FIFE COUNCIL  
 FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE  
 PLACE DIRECTORATE - BUSINESS AND EMPLOYABILITY SERVICE  
 CAPITAL INVESTMENT PLAN 2024-33  
 TOTAL COST MONITOR - MAJOR CAPITAL PROJECTS

Project	Service	Original Approved Budget £m	Current Project Budget £m	Total Outturn £m	Variance £m	Variance %	Current Project Status	Expected Project Completion Date
Fife Interchange Business Units - Phase 1 & 2	Inclusive Growth and Jobs	8.130	11.519	11.519	-	0.00%	Current Project	2024-25
John Smith Business Park Business Units	Inclusive Growth and Jobs	3.644	5.517	5.517	-	0.00%	Current Project	2025-26
Glenrothes - Riverside Park	Thriving Places	4.980	5.070	5.070	-	0.00%	Current Project	2024-25
<b>Total Major Projects over £5.000m</b>		<b>16.754</b>	<b>22.106</b>	<b>22.106</b>	<b>-</b>	<b>0.00%</b>		
Queensway Refurbishment	Inclusive Growth and Jobs	1.380	4.039	4.039	-	0.00%	Current Project	2026-27
Levenmouth Business Units - Phase 1	Inclusive Growth and Jobs	1.602	3.878	3.878	-	0.00%	Current Project	2024-25
Fife Interchange North Site Servicing	Inclusive Growth and Jobs	3.046	1.573	1.573	-	0.00%	Current Project	2024-25
Levenmouth Business Units - Phase 2	Inclusive Growth and Jobs	2.898	3.136	3.136	-	0.00%	Current Project	2025-26
Levenmouth Business Park Infrastructure	Inclusive Growth and Jobs	0.700	1.857	1.857	-	0.00%	Current Project	2024-25
Fife Interchange South- Site Servicing	Inclusive Growth and Jobs	1.138	4.736	4.736	-	0.00%	Future Project	2026-27
Inverkeithing Built Heritage	Thriving Places	1.176	1.300	1.300	-	0.00%	Current Project	2024-25
Dunfermline Gap Site Civic Space	Thriving Places	0.000	1.300	1.300	-	0.00%	Current Project	2025-26
Kirkcaldy Esplanade Phase 3	Thriving Places	1.500	1.302	1.302	-	0.00%	Current Project	2024-25
<b>Total Major Projects over £1.000m</b>		<b>13.440</b>	<b>23.121</b>	<b>23.121</b>	<b>-</b>	<b>0.00%</b>		
<b>Total Major Projects</b>		<b>30.194</b>	<b>45.228</b>	<b>45.228</b>	<b>-</b>	<b>0.00%</b>		

**FIFE COUNCIL  
FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE  
PLACE DIRECTORATE - BUSINESS AND EMPLOYABILITY SERVICE  
CAPITAL INVESTMENT PLAN 2024-33  
MONITORING REPORT 2024-25**

Appendix 2

<b>Expenditure</b>	<b>Current Budget £m</b>	<b>Actual to Date £m</b>	<b>Total Outturn £m</b>	<b>Variance £m</b>	<b>Outturn as % of Plan</b>
Regeneration - Town Centres	5.695	0.431	5.719	0.023	100%
Regeneration - Other	0.484	0.016	0.484	-	100%
Business Premises Refurbishment Programme	0.438	0.039	0.438	-	100%
Growing the Economy	0.069	0.227	0.069	-	100%
Place Based Investment Programme	1.678	0.316	1.678	-	100%
Business Property Portfolio	0.111	-	0.111	-	100%
Site Servicing Rolling Programme	0.425	0.010	0.403	(0.022)	0%
Vacant/Derelict Land	0.700	0.019	0.700	-	100%
Industrial Investment Programme	6.353	0.214	6.353	-	100%
Business Portfolio Energy Efficiency	0.140	0.005	0.140	-	100%
<b>TOTAL BUSINESS &amp; EMPLOYABILITY SERVICE</b>	<b>16.095</b>	<b>1.276</b>	<b>16.096</b>	<b>0.001</b>	<b>100%</b>
<b>TOTAL EXPENDITURE</b>	<b>16.095</b>	<b>1.276</b>	<b>16.096</b>	<b>0.001</b>	<b>100%</b>

<b>Income</b>	<b>Current Budget £m</b>	<b>Actual to Date £m</b>	<b>Total Outturn £m</b>	<b>Variance £m</b>	<b>Outturn as % of Plan</b>
Regeneration - Town Centres	(5.174)	(0.138)	(5.174)	-	100%
Regeneration - Other	(0.484)	(0.075)	(0.484)	-	100%
Business Premises Refurbishment Programme	(0.093)	(0.025)	(0.093)	-	100%
Growing the Economy	-	0.118	-	-	0%
Place Based Investment Programme	(1.678)	-	(1.678)	-	100%
Vacant/Derelict Land	(0.700)	-	(0.700)	-	100%
Industrial Investment Programme	(8.257)	(0.149)	(8.990)	(0.733)	109%
Site Servicing Rolling Programme	(0.362)	-	(0.362)	-	100%
<b>TOTAL BUSINESS &amp; EMPLOYABILITY SERVICE</b>	<b>(16.748)</b>	<b>(0.269)</b>	<b>(17.481)</b>	<b>(0.733)</b>	<b>104%</b>
<b>TOTAL INCOME</b>	<b>(16.748)</b>	<b>(0.269)</b>	<b>(17.481)</b>	<b>(0.733)</b>	<b>104%</b>

29<sup>th</sup> August 2024  
Agenda Item No. 12

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## 2023/24 Revenue Monitoring Provisional Outturn – Finance and Corporate Services

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**Report by:** Eileen Rowand, Executive Director, Finance and Corporate Services

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**Wards Affected:** All

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### Purpose

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The purpose of this report is to give members an update on the provisional outturn financial position for 2023/24 for the Finance and Corporate Services Directorate.

### Recommendations

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Committee is asked to consider the current financial performance and activity as detailed in this report.

### Resource Implications

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None.

### Legal & Risk Implications

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There are no direct legal implications arising from this report.

### Impact Assessment

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An EqlA has not been completed and is not necessary as no change or revision to existing policies and practices is proposed.

### Consultation

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None.

## 1.0 Background

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- 1.1 The report summarises the provisional outturn position for 2023/24, taking into account the actual expenditure incurred, and provides an explanation of the main budget variances at section 3.
- 1.2 The preparation of the 2023-24 Revenue Budget focussed on applying service underspends, budget realignment and vacancy factors to close the budget gap, and as such no specific savings proposals were approved by the Council as part of the Revenue Budget. There is therefore no requirement to include a Savings Tracker as part of financial reporting for the 2023-24 financial year.

## 2.0 Issues

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### 2.1 Provisional Outturn

- 2.1.1 Based on current information for the Finance and Corporate Services Directorate, of a service managed net expenditure budget of £56.127m the position across all Services is actual expenditure of £54.124m resulting in a provisional underspend of (£2.003m) (3.57%). This provisional outturn includes COVID-19 financial pressures of £0.624m.
- 2.1.2 Also, within the Finance and Corporate Services Directorate, there is a net expenditure budget of £5.650m for Benefits and Taxation, Corporate & Democratic Core and Miscellaneous Services which is showing a provisional underspend of (£0.515m) (9.12%).

Within Benefits and Taxation, there is an expenditure budget of £88.052m, mainly for Housing Benefit (HB) payments and Empty Property Relief, and income targets of (£81.424m) which includes the corresponding HB subsidy claim and the eligible HB Administration Fee.

These budgets sit within the Directorate but are managed corporately. Therefore, the Services within Finance and Corporate Services do not have a direct influence on these budgets. Corporate & Democratic Core was previously reported within the Chief Executive.

- 2.1.3 Appendix 1 shows actual expenditure against budget across the various Services within the Finance and Corporate Services Directorate. Section 3 provides a brief explanation of the main areas where there are significant variances (+/-£0.500m) between planned and actual expenditure and income across service managed budgets.

## 3.0 Major Variances

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- 3.1 **Directorate position – Variance (£2.518m) underspend, Movement £0.011m**
- 3.1.1 **Directorate Service Managed position (£2.003m) underspend, Movement (£0.287m)**



The COVID-19 pressures of £0.624m noted in paragraph 2.1.1 relate to home and remote working and additional staffing resources. These pressures are mainly within BTS and Human Resources. These costs are accounted for as an overspend to the Services but are being funded corporately on a temporary basis from balances. Therefore, the provisional underspend, excluding COVID-19 pressures, for the Finance and Corporate Services Directorate service managed budgets is (£2.627m).

There are currently significant recruitment challenges in most areas across the Finance & Corporate Services Directorate. This is mainly due to internal appointments and the backfilling of those posts, as well as competing with the external marketplace. The level of staff turnover and vacancies will have an impact on levels of service. It will also mean a greater workload, and this will need to be managed to minimise the impact on existing staff.

### **3.1.2 Finance (£0.571m) underspend, Movement (£0.351m)**

There is a provisional underspend on staff costs of (£0.286m), mainly due to the ongoing restructure within Audit & Corporate Fraud (£0.235m). Central support charges to the Housing Revenue Account (HRA) and the Pension Fund were higher than anticipated (£0.222m).

The movement relates to the increase in central support charges.

### **3.1.3 Revenue & Commercial Services (£1.065m) underspend, Movement (£0.288m)**

There is a provisional underspend on staff costs of (£0.919m) within Revenue & Commercial Services. This underspend is due to higher than anticipated staff turnover and vacant posts, particularly in Business Support (£0.842m). Business Support are still facing significant challenges in respect of recruitment leading to a considerable number of vacancies. Recruitment exercises have not been fully successful when Business Support try to fill posts as the number and standard of applicants is low. The number of vacancies will have an impact on providing full support to Services. Central support charges to the Pension Fund were higher than anticipated (£0.280m).

The movement relates to an increase in staff turnover, non-filling of posts and the increase in central support charges.

### **3.1.4 Human Resources (£1.050m) underspend, Movement (£0.184m)**

There is a provisional underspend on staff costs of (£1.247m). The main area of underspend relates to the Youth Investment Fund (£0.913m). The Youth Investment Fund is used to fund modern apprenticeships across the organisation. This is a ring-fenced budget and has not been fully utilised in this financial year, therefore any underspend will be carried forward to 2024-25. There has also been higher than anticipated staff turnover which has resulted in an underspend on staff costs of (£0.255m) which is offset by COVID pressures within HR relating to additional resources. There may be an impact on the level of service if the level of vacancies continue.

The movement relates to higher than anticipated staff turnover.

### 3.1.6 Benefits & Council Tax (£0.588m) underspend, Movement £0.446m

There is a provisional underspend of (£0.529m) which relates to the Empty Property Relief (EPR) funding which was devolved by the Scottish Government this financial year.

The movement is due to higher than anticipated properties that received EPR in the final quarter of 2023-24.

## 4.0 Conclusions

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- 4.1 The provisional outturn position for the service managed budget within the Finance and Corporate Services Directorate is a net underspend of (£2.003m) (3.57%), which includes COVID-19 financial pressures of £0.624m. The provisional outturn position for Benefits & Council Tax, Corporate & Democratic Core and Miscellaneous Services is a net underspend of (£0.515m) (9.12%).

### List of Appendices

- 1 Provisional Outturn 2023/24 Summary

### Background Papers

None

### Report Contact

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<b>BUDGET MONITORING REPORT SUMMARY FINANCE, ECONOMY &amp; CORPORATE SERVICES</b>					<b>Appendix 1</b>	
<b>FINANCE AND COPORATE SERVICES</b>	<b>CURRENT BUDGET 2023-24 £m</b>	<b>OUTTURN 2023-24 £m</b>	<b>VARIANCE £m</b>	<b>VARIANCE %</b>	<b>PREVIOUS REPORTED VARIANCE £m</b>	<b>MOVEMENT FROM PREVIOUS REPORTED VARIANCE £m</b>
<b>TOTAL COST OF SERVICES</b>	<b>71.856</b>	<b>69.331</b>	<b>(2.525)</b>	<b>-3.51%</b>	<b>(2.529)</b>	<b>0.003</b>
<b>LESS: CORPORATELY MANAGED ITEMS</b>	<b>10.079</b>	<b>10.072</b>	<b>(0.007)</b>	<b>-0.07%</b>	<b>0.000</b>	<b>(0.007)</b>
<b>SERVICE MANAGED NET BUDGET</b>	<b>61.778</b>	<b>59.259</b>	<b>(2.518)</b>	<b>-4.08%</b>	<b>(2.529)</b>	<b>0.010</b>
<b><u>ANALYSIS OF SERVICE MANAGED BUDGET</u></b>						
FINANCE & CORPORATE SERVICES MANAGEMENT	1.795	1.859	0.065	3.61%	0.005	0.060
ASSESSORS SERVICE	2.007	2.092	0.085	4.26%	(0.091)	0.176
FINANCE	4.036	3.466	(0.571)	-14.14%	(0.219)	(0.351)
REVENUE & COMMERCIAL SERVICES	17.033	15.968	(1.065)	-6.25%	(0.777)	(0.288)
HUMAN RESOURCES	7.445	6.394	(1.050)	-14.11%	(0.866)	(0.184)
BUSINESS TECHNOLOGY SOLUTIONS	19.400	19.895	0.495	2.55%	0.195	0.300
LEGAL & DEMOCRATIC SERVICES	4.412	4.449	0.037	0.84%	0.038	(0.001)
	56.127	54.124	(2.003)	-3.57%	(1.716)	(0.287)
BENEFITS AND TAXATION	6.628	6.040	(0.588)	-8.86%	(1.034)	0.446
CORPORATE & DEMOCRATIC CORE	3.172	3.244	0.072	2.26%	0.221	(0.149)
MISCELLANEOUS SERVICES	(4.150)	(4.149)	0.001	-0.02%	0.000	0.001
	5.650	5.135	(0.515)	-9.12%	(0.813)	0.298
<b>FINANCE AND CORPORATE SERVICES</b>	<b>61.777</b>	<b>59.259</b>	<b>(2.518)</b>	<b>-4.08%</b>	<b>(2.529)</b>	<b>0.011</b>

29<sup>th</sup> August 2024  
Agenda Item No. 13

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## 2024/25 Revenue Monitoring Projected Outturn – Finance and Corporate Services

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**Report by:** Eileen Rowand, Executive Director, Finance and Corporate Services

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**Wards Affected:** All

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### Purpose

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The purpose of this report is to give members an update on the projected outturn financial position for 2024/25 for the Finance and Corporate Services Directorate.

### Recommendations

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Committee is asked to consider the current financial performance and activity as detailed in this report.

### Resource Implications

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None.

### Legal & Risk Implications

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There are no direct legal implications arising from this report.

### Impact Assessment

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An EqlA has not been completed and is not necessary as no change or revision to existing policies and practices is proposed.

### Consultation

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None.

## 1.0 Background

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- 1.1 The report summarises the projected outturn position for 2024/25, taking into account the actual expenditure incurred, and provides an explanation of the main budget variances at section 3. This is the first monitoring report to the Scrutiny Committee for the 2024/25 financial year.
- 1.2 There were no specific savings included in the preparation of the 2024-25 Revenue Budget, therefore a savings tracker is not required as part of financial reporting for the 2024-25 financial year.

## 2.0 Issues

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### 2.1 Projected Outturn

- 2.1.1 Based on current information for the Finance and Corporate Services Directorate, of a service managed net expenditure budget of £56.553m the position across all Services is a projected expenditure of £54.874m resulting in a projected net underspend of (£1.680m) (2.97%).
- 2.1.2 Also, within the Finance and Corporate Services Directorate, there is a net expenditure budget of £9.4m for Benefits and Taxation, Corporate & Democratic Core and Miscellaneous Services which is currently forecasting a break-even position. This budget sits within the Directorate but is managed corporately.

Within Benefits and Taxation, there is an expenditure budget of £87.197m, mainly for Housing Benefit (HB) payments and Empty Property Relief, and income targets of (£81.424m) which includes the corresponding HB subsidy claim and the eligible HB Administration Fee.

These budgets sit within the Directorate but are managed corporately. Therefore, the Services within Finance and Corporate Services do not have a direct influence on these budgets.

- 2.1.3 Appendix 1 shows projected expenditure against budget across the various Services within the Finance and Corporate Services Directorate. Section 3 provides a brief explanation of the main areas where there are significant variances (+/-£0.500m) between planned and projected expenditure and income across service managed budgets.

## 3.0 Major Variances

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- 3.1 **Directorate position – Variance (£1.680m) underspend**
  - 3.1.1 **Directorate Service Managed position (£1.680m) underspend**
  - 3.1.2 **Revenue & Commercial Services (£0.679m) underspend**

The underspend of (£0.679m) relates to staff costs within Business Support. Business Support are still facing significant challenges in respect of recruitment leading to a

considerable number of vacancies. The number of vacancies will have an impact on providing full support to Services.

### 3.1.3 Human Resources (£0.735m) underspend

There is an underspend on staff costs of (£0.735m). The main area of this underspend relates to the Youth Investment Fund (£0.422m). This is a ring-fenced budget, and any underspend will be carried forward to 2025-26. There has also been higher than anticipated staff turnover which has resulted in an underspend on staff costs of (£0.200m). The balance of underspend (£0.113m) relates to NI savings for the Shared Service AVC scheme. There has been a significant increase in the uptake of this employee benefit.

## 4.0 Conclusions

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- 4.1 The projected outturn position for the service managed budget within the Finance and Corporate Services Directorate is a net underspend of (£1.680m) (2.97%). Benefits and Taxation, Corporate & Democratic Core and Miscellaneous Services are projecting a breakeven position.

### List of Appendices

- 1 Projected Outturn 2024/25 Summary

### Background Papers

None

### Report Contact

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**BUDGET MONITORING REPORT SUMMARY  
FINANCE, ECONOMY & CORPORATE SERVICES**

<b>FINANCE AND COPORATE SERVICES</b>	<b>CURRENT BUDGET 2024-25 £m</b>	<b>FORECAST 2024-25 £m</b>	<b>VARIANCE £m</b>	<b>VARIANCE %</b>
<b>TOTAL COST OF SERVICES</b>	<b>66.138</b>	<b>64.458</b>	<b>(1.680)</b>	<b>-2.54%</b>
<b>LESS: CORPORATELY MANAGED ITEMS</b>	<b>0.184</b>	<b>0.184</b>	<b>0.000</b>	<b>0.22%</b>
<b>SERVICE MANAGED NET BUDGET</b>	<b>65.954</b>	<b>64.274</b>	<b>(1.680)</b>	<b>-2.55%</b>
<b><u>ANALYSIS OF SERVICE MANAGED BUDGET</u></b>				
FINANCE & CORPORATE SERVICES MANAGEMENT	1.762	1.762	0.000	0.00%
ASSESSORS SERVICE	2.127	2.127	0.000	0.00%
FINANCE	3.821	3.821	0.000	0.00%
REVENUE & COMMERCIAL SERVICES	16.472	15.794	(0.679)	-4.12%
HUMAN RESOURCES	7.908	7.173	(0.735)	-9.30%
BUSINESS TECHNOLOGY SOLUTIONS	20.030	19.764	(0.266)	-1.33%
LEGAL & DEMOCRATIC SERVICES	4.434	4.434	0.000	0.00%
	<b>56.553</b>	<b>54.874</b>	<b>(1.680)</b>	<b>-2.97%</b>
BENEFITS & COUNCIL TAX	5.774	5.774	0.000	0.00%
CORPORATE & DEMOCRATIC CORE	3.527	3.527	0.000	0.00%
MISCELLANEOUS SERVICES	0.099	0.099	0.000	0.00%
	<b>9.400</b>	<b>9.400</b>	<b>0.000</b>	<b>0.00%</b>
<b>FINANCE AND CORPORATE SERVICES</b>	<b>65.954</b>	<b>64.274</b>	<b>(1.680)</b>	<b>-2.55%</b>

29<sup>th</sup> August 2024  
Agenda Item No. 14

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## 2023/24 Capital Monitoring Provisional Outturn – Finance and Corporate Services Directorate

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**Report by:** Eileen Rowand, Executive Director, Finance and Corporate Services

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**Wards Affected:** All

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### Purpose

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The purpose of this report is to provide an update on the Capital Investment Plan and advise on the provisional financial position for the 2023/24 financial year for the Finance and Corporate Services Directorate.

### Recommendation(s)

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Committee is asked to consider the current financial performance and activity as detailed in this report.

### Resource Implications

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None.

### Legal & Risk Implications

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None.

### Impact Assessment

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An EqlA has not been completed and is not necessary as no change or revision to existing policies and practices is proposed.

### Consultation

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None.



# 1.0 Background

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- 1.1 This report summarises the provisional capital outturn for the Finance and Corporate Services Directorate for 2023/24. At this stage, actual expenditure is £3.556m against a budget of £3.387m, representing 105% of the approved capital programme for 2023-24.
- 1.2 Appendix 1 shows an analysis of specific projects in the current capital investment plan which have a budget greater than £1m and analyses total project cost rather than only in year spend.
- 1.3 Appendix 2 details the forecast expenditure against budget for each project. A brief explanation of any significant forecast variances is provided at section 2 within this report.

# 2.0 Issues, Achievements & Financial Performance

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## 2.1 Key Issues / Risks

- 2.1.1 Appendix 1 details the total cost forecast position for all capital projects within the Finance and Corporate Services Directorate with an overall value of £1m and over. The key risks associated with the major projects are noted below.
- 2.1.2 Across the Capital Investment Plan there continues to be risk that both the timing and the costs of projects are adversely affected by the current economic climate. Throughout the programme, issues are continuing to be identified in relation to the supply of construction materials, the consequences of which have been considered and reflected in the Capital Investment Plan review which was approved by Fife Council on 22 June 2023. Monitoring of the impact of any additional costs on projects still in their infancy will continue and any significant impact on timescales and associated risks will be reported to this committee. Where appropriate, any known impact on timing of delivery of projects has been built in to the rephased plan and the overall scale of any additional costs or further delays will be considered as part of the review of the Capital Investment Plan.

## 2.2 Major Projects – Potential Risks and Actions

- 2.2.1 There are no additional or new risks arising in the current reporting period from any of the major projects being progressed.
- 2.2.2 There is one major project with a budget of over £1m for Finance and Corporate Services. This project relates to the Local Area Network (LAN) as detailed in Appendix 1. The total budget is £7.314m over the life of the project. The projected spend for this project is on budget.

## 2.3 Financial Performance – 2023/24 Provisional Outturn

- 2.3.1 Appendix 2 provides a summary of the provisional outturn for each project for the financial year 2023/24.

2.3.2 Slippage is the term used to describe projects that are expected to spend less than the budget allocation in a particular year due to a delay in timing on the delivery of the project. This is not uncommon in the capital programme and the reasons for this can be wide and varied. Advancement is the term used to describe projects that are expected to spend more than the budget allocation in a particular year due to an acceleration of the budget from future years.

2.3.3 There are no major variances within the current approved programme.

## 3.0 Conclusions

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3.1 The total 2023/24 approved programme for the Finance and Corporate Services Directorate is £3.387m, with an actual expenditure of £3.556m.

3.2 The management of capital resources require us to look across financial years, as well as within individual years. The current year performance is only a snapshot of the existing plan, and the Directorate will adjust expenditure levels within future years of the plan to accommodate the advancement or slippage of projects.

### List of Appendices

1. Total Cost Monitor
2. Capital Monitoring Report

### Report Contact

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FIFE COUNCIL  
 FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE  
 FINANCE & CORPORATE SERVICES  
 CAPITAL INVESTMENT PLAN 2023-33  
 TOTAL COST MONITOR - MAJOR CAPITAL PROJECTS

Project	Service	Original Approved Budget £m	Current Project Budget £m	Total Outturn £m	Variance £m	Variance %	Current Project Status	Expected Project Completion Date
Local Area Network	Maintaining Our Assets	7.200	7.314	7.314	-	0.00%	Current Project	2029-30
<b>Total Major Projects over £5.000m</b>		<b>7.200</b>	<b>7.314</b>	<b>7.314</b>	<b>-</b>	<b>0.00%</b>		

**FIFE COUNCIL  
 FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE  
 FINANCE & CORPORATE SERVICES  
 CAPITAL INVESTMENT PLAN 2023-33  
 MONITORING REPORT 2023-24**

**Appendix 2**

<b>Expenditure</b>	<b>Current Budget £m</b>	<b>Actual to Date £m</b>	<b>Total Outturn £m</b>	<b>Variance £m</b>	<b>Outturn as % of Plan</b>
ICT Programme	1.625	1.654	1.654	0.029	102%
BTS Capital	1.000	1.195	1.195	0.195	120%
BTS Rolling Programme	0.762	0.706	0.706	(0.056)	93%
<b>TOTAL FINANCE &amp; CORPORATE SERVICES</b>	<b>3.387</b>	<b>3.556</b>	<b>3.556</b>	<b>0.169</b>	<b>105.0%</b>

29<sup>th</sup> August 2024  
Agenda Item No. 15

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## 2024/25 Capital Monitoring Projected Outturn – Finance and Corporate Services Directorate

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**Report by:** Eileen Rowand, Executive Director, Finance and Corporate Services

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**Wards Affected:** All

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### Purpose

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The purpose of this report is to provide an update on the Capital Investment Plan and advise on the projected financial position for the 2024/25 financial year for the Finance and Corporate Services Directorate.

### Recommendation(s)

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Committee is asked to consider the current financial performance and activity as detailed in this report.

### Resource Implications

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None.

### Legal & Risk Implications

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None.

### Impact Assessment

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An EqlA has not been completed and is not necessary as no change or revision to existing policies and practices is proposed.

### Consultation

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None.

## 1.0 Background

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- 1.1 This report summarises the projected capital outturn for the Finance and Corporate Services Directorate for 2024/25. At this stage, it is forecast that expenditure will be £4.060m against a budget of £4.060m, representing 100% of the approved capital programme for 2024/25.
- 1.2 Appendix 1 shows an analysis of specific projects in the current capital investment plan which have a budget greater than £1m and analyses total project cost rather than only in year spend.
- 1.3 Appendix 2 details the forecast expenditure against budget for each project. A brief explanation of any significant forecast variances is provided at section 2 within this report.

## 2.0 Issues, Achievements & Financial Performance

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### 2.1 Key Issues / Risks

- 2.1.1 Appendix 1 details the total cost forecast position for all capital projects within the Finance and Corporate Services Directorate with an overall value of £1m and over. The key risks associated with the major projects are noted below.
- 2.1.2 Across the Capital Investment Plan there continues to be risk that both the timing and the costs of projects are adversely affected by the current economic climate. Throughout the programme, issues are continuing to be identified in relation to the supply of construction materials, the consequences of which have been considered and reflected in the Capital Investment Plan review which was approved by Fife Council on 22 June 2023. Monitoring of the impact of any additional costs on projects still in their infancy will continue and any significant impact on timescales and associated risks will be reported to this committee. Where appropriate, any known impact on timing of delivery of projects has been built in to the rephased plan and the overall scale of any additional costs or further delays will be considered as part of the review of the Capital Investment Plan.

### 2.2 Major Projects – Potential Risks and Actions

- 2.2.1 There are no additional or new risks arising in the current reporting period from any of the major projects being progressed.
- 2.2.2 There is one major project with a budget of over £1m for Finance and Corporate Services. This project relates to the Local Area Network (LAN) as detailed in Appendix 1. The total budget is £7.314m over the life of the project. The projected spend for this project is on budget.

### 2.3 Financial Performance – 2024/25 Projected Outturn

- 2.3.1 Appendix 2 provides a summary of the projected outturn for each project for the financial year 2024/25.

2.3.2 Slippage is the term used to describe projects that are expected to spend less than the budget allocation in a particular year due to a delay in timing on the delivery of the project. This is not uncommon in the capital programme and the reasons for this can be wide and varied. Advancement is the term used to describe projects that are expected to spend more than the budget allocation in a particular year due to an acceleration of the budget from future years.

2.3.3 There are no major variances within the current approved programme.

## 3.0 Conclusions

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3.1 The total 2024/25 approved programme for the Finance and Corporate Services Directorate is £4.060m, with a forecasted level of expenditure of £4.060m.

3.2 The management of capital resources require us to look across financial years, as well as within individual years. The current year performance is only a snapshot of the existing plan, and the Directorate will adjust expenditure levels within future years of the plan to accommodate the advancement or slippage of projects.

### List of Appendices

1. Total Cost Monitor
2. Capital Monitoring Report

### Report Contact

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FIFE COUNCIL  
 FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE  
 FINANCE & CORPORATE SERVICES  
 CAPITAL INVESTMENT PLAN 2023-33  
 TOTAL COST MONITOR - MAJOR CAPITAL PROJECTS

Project	Service	Original Approved Budget £m	Current Project Budget £m	Total Outturn £m	Variance £m	Variance %	Current Project Status	Expected Project Completion Date
Local Area Network	Maintaining Our Assets	7.200	7.314	7.314	-	0.00%	Current Project	2028-29
<b>Total Major Projects over £5.000m</b>		<b>7.200</b>	<b>7.314</b>	<b>7.314</b>	<b>-</b>	<b>0.00%</b>		



**FIFE COUNCIL  
 FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE  
 FINANCE & CORPORATE SERVICES  
 CAPITAL INVESTMENT PLAN 2023-33  
 MONITORING REPORT 2024-25**

**Appendix 2**

<b>Expenditure</b>	<b>Current Budget £m</b>	<b>Actual to Date £m</b>	<b>Total Outturn £m</b>	<b>Variance £m</b>	<b>Outturn as % of Plan</b>
ICT Programme	1.333	0.009	1.333	-	100%
BTS Capital	1.000	0.190	1.000	-	100%
BTS Rolling Programme	1.727	0.070	1.727	-	100%
<b>TOTAL FINANCE &amp; CORPORATE SERVICES</b>	<b>4.060</b>	<b>0.269</b>	<b>4.060</b>	<b>-</b>	<b>100.0%</b>

DATE

Agenda Item No.

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## Finance, Economy and Corporate Services Scrutiny Committee Workplan

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**Report by:** Eileen Rowand, Executive Director Finance and Corporate Services

**Wards Affected:** All

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### Purpose

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This report supports the Committee's consideration of the workplan for future meetings of the Committee.

### Recommendation(s)

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It is recommended that the Committee review the workplan and that members come forward with suggestions for areas of scrutiny.

### Resource Implications

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Committee should consider the resource implication for Council staff of any request for future reports.

### Legal & Risk Implications

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Committee should consider seeking inclusion of future items on the workplan by prioritising those which have the biggest impact and those which seek to deal with the highest level of risk.

### Impact Assessment

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None required for this paper.

### Consultation

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The purpose of the paper is to support the Committee's discussion and therefore no consultation is necessary.

## 1.0 Background

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- 1.1 Each Scrutiny Committee operates a workplan which contains items that fall under three broad headings: performance reporting, planning and improvement work. These items will often lead to reactive rather than proactive scrutiny. Discussion on the workplan agenda item will afford members the opportunity to shape, as a committee, the agenda with future items of business it wishes to review in more detail.

## 2.0 Conclusions

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- 2.1 The current workplan is included as Appendix one and should be reviewed by the committee to help inform scrutiny activity.

### List of Appendices

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1. Workplan

### Background Papers

The following papers were relied on in the preparation of this report in terms of the Local Government (Scotland) Act, 1973:-

None

### Report Contact

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<b>Finance, Economy and Corporate Services Scrutiny Committee of 21 November 2024</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
Bad Debts 2023-2024	Finance and Corporate Services, Housing Services	Les Robertson, John Mills	
Finance & Corporate Services Directorate Performance Report.	Finance and Corporate Services	Eileen Rowand	
'Evaluation of Fife's Employability Programme 2014- 2020 funded by ESF (European Social Fund)	Business and Employability	Morag Millar, Adam Dunkerley	
Business Gateway Fife Annual Report	Business and Employability	Pamela Stevenson	
Smart Place Approach - City of Dunfermline	Business and Employability	Morag Millar	
Business & Employability - Annual Service Review Report 2023-2024	Business and Employability	Morag Millar, Pamela Stevenson, Kirsty Martin-ep	
Opportunities Fife	Business and Employability	Morag Millar, Adam Dunkerley	
2024/25 Revenue Monitoring Projected Outturn - Planning Service, Business and Employability Service	Finance and Corporate Services, Place	Ashleigh Allan	
2024/25 Capital Monitoring Projected Outturn - Business and Employability Service	Finance and Corporate Services, Place	Ashleigh Allan	
2024/25 Revenue Monitoring Projected Outturn - Finance and Corporate Services	Finance and Corporate Services	Tracy Hirst	
2024/25 Capital Monitoring Projected Outturn - Finance and Corporate Services	Finance and Corporate Services	Tracy Hirst	

<b>Finance, Economy and Corporate Services Scrutiny Committee of 21 November 2024</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
Finance, Economy & Corporate Services Scrutiny Committee Forward Work Programme	Finance and Corporate Services	Helena Couperwhite	

<b>Finance, Economy and Corporate Services Scrutiny Committee of 30 January 2025</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
Annual Procurement Report	Business and Employability	Caroline Macdonald	
Planning Performance Framework		Alastair Hamilton	
Finance, Economy & Corporate Services Forward Work Programme	Finance and Corporate Services	Helena Couperwhite	

<b>Finance, Economy and Corporate Services Scrutiny Committee of 27 March 2025</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
Tay Cities Deal - Annual Report	Business and Employability	Morag Millar, Carlene Simpson	
Annual Report - Edinburgh and South East Scotland City Region Deal	Business and Employability	Morag Millar, Carlene Simpson	
Finance, Economy & Corporate Services Scrutiny Committee Forward Work Programme	Finance and Corporate Services	Helena Couperwhite	

<b>Finance, Economy and Corporate Services Scrutiny Committee of 5 June 2025</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
Attendance Management Update Report	Human Resources	Barbara Cooper, Sharon McKenzie	

<b>Unallocated</b>			
<b>Title</b>	<b>Service(s)</b>	<b>Contact(s)</b>	<b>Comments</b>
report on support and services for staff and elected members	Finance and Corporate Services	Lindsay Thomson	
Legacy Systems Replacement Programme in the Place Directorate	Environment & Building Operations (AT&E)	John Rodigan	