

MERTON COUNCIL BUSINESS PLAN 2022-26 MEMBER'S INFORMATION PACK

Members are requested to bring this information pack to the following meetings:-

Healthier Communities and Older People Overview and Scrutiny Panel	10 January 2022
Children and Young People Overview and Scrutiny Panel	12 January 2022
Sustainable Communities Overview and Scrutiny Panel	18 January 2022
Overview and Scrutiny Commission	19 January 2022
Cabinet	7 February 2022
Budget Council	2 March 2022

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All sections are grouped by Scrutiny Panel/Commission

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SAVINGS TARGETS BY DEPARTMENT

	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	TOTAL £000
Corporate Services	255	3,433	808	726	5,222
Children, Schools and Families	173	2,322	547	491	3,533
Environment and Regeneration	355	4771	1,123	1,008	7,257
Community and Housing	393	5,281	1,243	1,116	8,033
TOTAL	1,176	15,807	3,721	3,341	24,045
Cumulative Total	1,176	16,983	20,704	24,045	

SAVINGS PROPOSALS

	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	TOTAL £000
Corporate Services	229	25	0	0	254
Children, Schools and Families	178	340	0	0	518
Environment and Regeneration	229	617	(111)	(111)	624
Community and Housing	300	800	0	0	1,100
TOTAL	936	1,782	(111)	(111)	2,496
Cumulative Total	936	2,718	2,607	2,496	

UNACHIEVED SAVINGS - IMPACT ON MTFS

	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	TOTAL £000
Corporate Services	753	(753)	0	0	0
Children, Schools and Families	400	(400)	0	0	0
Environment and Regeneration	1500	(600)	(575)	0	325
Community and Housing	988	(988)	0	0	0
TOTAL	3,641	(2,741)	(575)	0	325
Cumulative Total	3,641	900	325	325	

NEW SAVINGS PROPOSALS 2022-26: SUMMARY

	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	TOTAL £000
Corporate Services	229	25	0	0	254
Children, Schools and Families	178	340	0	0	518
Environment and Regeneration	229	617	(111)	(111)	624
Community and Housing	300	800	0	0	1,100
TOTAL	936	1,782	(111)	(111)	2,496
Cumulative Total	936	2,718	2,607	2,496	

KEY

Type of Saving

SI1	Income: increase in current level of charges
SI2	Income: increase arising from expansion of existing service/new service
SS1	Staffing: reduction in costs due to efficiency
SS2	Staffing: reduction in costs due to deletion/reduction in service
SNS1	Non - Staffing: reduction in costs due to efficiency
SNS2	Non - Staffing: reduction in costs due to deletion/reduction in service
SP1	Procurement / Third Party arrangements - efficiency
SP2	Procurement / Third Party arrangements - deletion/reduction in service
SG1	Grants: Existing service funded by new grant
SG2	Grants: Improved Efficiency of existing service currently funded by unringfenced grant
SPROP	Reduction in Property related costs

Panel

C&YP	Children and Young People
OS	Overview and Scrutiny
HC&OP	Healthier Communities and Older People
	Sustainable Communities

**PROPOSED
DEPARTMENT: Corporate Services**

Panel	Ref	Description of Saving		Baseline Budget 21/22 £000	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	Risk Analysis Deliverability	Risk Analysis Reputational Impact	Type of Saving (see key)
OS	2022-23 CS1	Service/Section	Resources - CS Director Budget								
		Description	Reduction to consultancy held within Director's budget	18	10				Low	Medium	SNS1
		Service Implication	None								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	None								
OS	2022-23 CS2	Service/Section	Resources - AD budget								
		Description	Reduction to Resources AD various running cost budgets, eg subscriptions	86	15				Low	Low	SNS1
		Service Implication	None								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	None								
OS	2022-23 CS3	Service/Section	Resources - Insurance								
		Description	Reduce contribution to the insurance provision	636	25				Low	Low	SNS1
		Service Implication	None								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	None								

**PROPOSED
DEPARTMENT: Corporate Services**

Panel	Ref	Description of Saving		Baseline Budget 21/22 £000	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	Risk Analysis Deliverability	Risk Analysis Reputational Impact	Type of Saving (see key)
OS	2022-23 CS4	Service/Section	HR - Payroll	204	15				Low	Low	SNS1/SI2
		Description	Increased schools payroll buy-back income and reduced payroll postage spend								
		Service Implication	None								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	None								
OS	2022-23 CS5	Service/Section	Customer, Policy & Improvement - Registrars Service	523	32				Medium	Medium	SI2
		Description	Increase income budget in Registrars service								
		Service Implication	None								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	None								
OS	2022-23 CS6	Service/Section	Customer, Policy & Improvement - cash collection	89	20				Low	Low	SNS1
		Description	Reduction in cash collection costs								
		Service Implication	None								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	None								

**PROPOSED
DEPARTMENT: Corporate Services**

Panel	Ref	Description of Saving		Baseline Budget 21/22 £000	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	Risk Analysis Deliverability	Risk Analysis Reputational Impact	Type of Saving (see key)
OS	2022-23 CS7	Service/Section	Customer, Policy & Improvement - Merton Link								
		Description	Rationalisation of Merton Link budgets	662		20			Low	Low	SNS1
		Service Implication									
		Staffing Implications	None None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	None								
OS	2022-23 CS8	Service/Section	Customer, Policy & Improvement - Customer Contact								
		Description	Delete Head of Information Governance post (£29k saving shown in Corporate Governance and £15k shown in CPI)	74	15				Low	Low	SS1
		Service Implication	Per below staffing implication								
		Staffing Implications	The information governance team was restructured in September 2021 and the head of IG post deleted. The								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	TBC								
OS	2022-23 CS9	Service/Section	Corporate Governance - AD Budget								
		Description	Reduce various AD budget running expenses	10	3				Low	Low	SNS1
		Service Implication	There is currently provision in the budget for catering and stationery which has historically been underspent and which can therefore be reduced.								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	None								

**PROPOSED
DEPARTMENT: Corporate Services**

Panel	Ref	Description of Saving		Baseline Budget 21/22 £000	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	Risk Analysis Deliverability	Risk Analysis Reputational Impact	Type of Saving (see key)
OS	2022-23 CS10	Service/Section	Corporate Governance - Electoral Services								
		Description	Electoral services - reduction in canvass expenses and postage	94	15				Low	Low	SNS1
		Service Implication	The process of canvass reform has reduced the number of letters which need to be sent to households every year. It is prudent to send confirmation letters close to elections to give residents a chance to check their details but there are no scheduled elections in 2023 and other electronic methods can be developed over the next years to reduce the need for physical letters. If there were a wish to reinstate them consideration would have to be given to one off provision for this								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	TBC								
OS	2022-23 CS11	Service/Section	Corporate Governance - Legal								
		Description	Increase legal third party income, eg s.106 agreements	180		5			Low	Low	SI1
		Service Implication	SLLP charge developers for the preparation of s.106 agreements as well as purchasers of land for the preparation of documentation. A modest increase in these rates would generate a small additional income								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	None								

**PROPOSED
DEPARTMENT: Corporate Services**

Panel	Ref	Description of Saving		Baseline Budget 21/22 £000	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	Risk Analysis Deliverability	Risk Analysis Reputational Impact	Type of Saving (see key)	
OS	2022-23 CS12	Service/Section	Corporate Governance - Information Team									
		Description	Delete Head of Information Governance post (£29k saving shown in Corporate Governance and £15k shown in CPI)	74	29					Low	Low	SS1
		Service Implication	Per below staffing implication									
		Staffing Implications	The information governance team was restructured in September 2021 and the head of IG post deleted. The complaints team now reports to the Head of Communications and the land charges and information governance functions are managed within SLLP.									
		Business Plan implications	None									
		Impact on other departments	None									
		Equalities Implications	TBC									
Page 15	2022-23 CS13	Service/Section	Corporate items									
		Description	Reduction to corporately funded items budget	437	50					Low	Medium	SNS1
		Service Implication	None									
		Staffing Implications	None									
		Business Plan implications	None									
		Impact on other departments	None									
		Equalities Implications	None									
Total Corporate Services Savings 2022-26					229	25	0	0				

**PROPOSED
DEPARTMENT: CHILDREN, SCHOOLS AND FAMILIES**

Panel	Ref	Description of Saving		Baseline Budget 21/22 £000	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	Risk Analysis Deliverability	Risk Analysis Reputational Impact	Type of Saving (see key)
C&YP	CSF1-22/23	Service/Section	Education								
		Description	Direct procurement of services previously within schools PFI contract	8471	100				Medium	Low	SNS1
		Service Implication	None								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	TBC								
C&YP	CSF2-22/23	Service/Section	Education								
		Description	Office Efficiency	TBD	50				Low	Low	SNS1
		Service Implication	Continuation of existing work patterns (post pandemic)								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	TBC								

**PROPOSED
DEPARTMENT: CHILDREN, SCHOOLS AND FAMILIES**

Panel	Ref	Description of Saving		Baseline Budget 21/22 £000	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	Risk Analysis Deliverability	Risk Analysis Reputational Impact	Type of Saving (see key)
C&YP	CSF3-22/23	Service/Section	Education	TBD	28				Low	Medium	SNS1
		Description	Education Inclusion - streamlined activities								
		Service Implication	Same service more efficiently delivered								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	TBC								
CYP	CSF4-22/23	Service/Section	Children's Social Care	6,671		340			Low	Low	SNS1
		Description	CSC Placements - demand management and commissioning								
		Service Implication	Regular and systematic review of high cost placements								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	Ensuring a design of the review process that does not have an equalities impact								
Total Children, Schools and Families Savings 2022-26					178	340	0	0			

PROPOSED DEPARTMENT: ENVIRONMENT AND REGENERATION

Panel	Ref	Description of Saving		Baseline Budget 21/22 £000	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	Risk Analysis Deliverability	Risk Analysis Reputational Impact	Type of Saving (see key)
SC	ENV2022-23 01	Service/Section Description Service Implication Staffing Implications Business Plan implications Impact on other departments Equalities Implications	Public Space - Waste services Disposal processing savings (Food Waste Recyclate) Change in delivery location None Aligned with recycling performance None Completed	321	104				Low	Low	SP1
SC	ENV2022-23 02	Service/Section Description Service Implication Staffing Implications Business Plan implications Impact on other departments Equalities Implications	Public Space - Greenspaces Raynes Park Sports Ground - new lease arrangement Improvement of community sporting activities and renovation of existing infrastructure and buildings None Consistent with business plan objectives and aligned with Playing Pitch Strategy None	0	35	35			Low	Low	SI2
OS	ENV2022-23 03	Service/Section Description Service Implication Staffing Implications Business Plan implications Impact on other departments Equalities Implications	Public Space - Greenspaces Deen City Farm - Reduction in grant by 50% No direct impact to the Greenspaces service None Third party grant support reduction will have an impact on the delivery of local services that benefit young people Further discussions will need to be undertaken to minimise the impact on the reduction in funding	86	0	43			Low	High	SP2
OS	ENV2022-23 04	Service/Section Description Service Implication Staffing Implications Business Plan implications Impact on other departments Equalities Implications	Parking Continue to enforce School Street locations through ANPR camera enforcement. Ongoing management of ANPR infrastructure and staff resources to maintain enforcement of School Streets. Estimated 6 x FTE dependent in PCN activity to process, deal with appeals and process applications. A business plan for the introduction of School Street enforcement was approved in February 2021. School Street zones is a new policy and ANPR enforcement of the zones is a new type of Moving Traffic Contravention. It is unknown at this stage the likely future compliance is. Our aim if for fewer vehicles to be issued with a PCN as drivers comply with the rules. Therefore the saving expectation is reduced each year to reflect this compliance rate. The enforcement and appeal process is primarily managed within the Parking Service. There is minimal impact on other service areas. None	0	0	489	(111)	(111)	Medium	High	SS1

PROPOSED DEPARTMENT: ENVIRONMENT AND REGENERATION

Panel	Ref	Description of Saving		Baseline Budget 21/22 £000	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	Risk Analysis Deliverability	Risk Analysis Reputational Impact	Type of Saving (see key)
SC	ENV2022-23 05	Service/Section Description	Highways: Steet Permitting Increased income from street permitting through enforcement of utility works.	72	40				Medium	Low	SI1
		Service Implication	Increased monitoring of utility and development defects								
		Staffing Implications	Managed within existing staff resource								
		Business Plan implications	Increased income and fee charges - already set								
		Impact on other departments	N/A								
		Equalities Implications	Improved public realm useability								
SC	ENV2022-23 06	Service/Section Description	Highways: Advertising Increased income from JC Decaux digital ads	473		10			Low	Low	SI2
		Service Implication	None								
		Staffing Implications	Managed within existing staff resource								
		Business Plan implications	Would contribute to additional revenue income.								
		Impact on other departments	None								
		Equalities Implications	None								
OS	ENV2022-23 07	Service/Section Description	Future Merton, Policy team Additional income from planning performance agreements (PPA) for the contribution of specialist input in to major planning applications	470	50				Medium	Low	SI2
		Service Implication	Would provide additional advice to the development control team in support of planning applications.								
		Staffing Implications	Would require prioritisation by Future Merton policy team on PPA support; managed within existing staffing resources.								
		Business Plan implications	Would contribute to additional revenue income.								
		Impact on other departments	None								
		Equalities Implications	None								
SC	ENV2022-23 08	Service/Section Description	Property Management & Review Rent Review Income	50		40			Medium	Low	S11
		Service Implication	Additional income from undertaking commercial property rent reviews								
		Staffing Implications	Undertaken through additional spend to save external consultants to undertake rent reviews								
		Business Plan implications	Increase in revenue income for the Council								
		Impact on other departments	some additional actions for finance and legal sections								
		Equalities Implications	No detriment to any group								
Total Environment and Regeneration Savings 2022-26					229	617	(111)	(111)			

PROPOSED DEPARTMENT: Community and Housing

Panel	Ref	Description of Saving		Baseline Budget 21/22 £000	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	Risk Analysis Deliverability	Risk Analysis Reputational Impact	Type of Saving (see key)
HC&OP	CH104	Service/Section	Adult Social Care	2,889	0	500	0	0	High	Medium	SS1/SNS1
		Description	Discharge to Assess								
		Service Implication	Explore the most effective and efficient discharge to assess model across Merton. The financial benefit at this stage has three potential outcomes those being: - securing additional income to the local authority through integration routes, reduction in staffing where post and costs can be shared, and reduced use of long term care as a result of more effective discharge model								
		Staffing Implications	These will become clear as the model develops								
		Business Plan implications	It could significantly change part of the ASC business model								
		Impact on other departments	These will become clear as the model develops								
		Equalities Implications	The purpose will be to improve the outcomes for some of the most vulnerable in our community. The EIA will be updated at the point when in scope employees are identified (early 2022/23) and any necessary mitigation will be put in place at that time. There will be indirect mitigations required by partners to this proposal								
HC&OP	CH105	Service/Section	Commissioning and Market Development	43,000	100	150	0	0	Low	Low	SNS1
		Description	Increasing take up of Direct Payments to deliver improved choice and control for residents and better value for the Council								
		Service Implication	Changed proportion of commissioned vs self-managed packages of care								
		Staffing Implications	May mean some reallocation of activity within teams, but no change in overall resource								
		Business Plan implications	Consistent with Business Plan priorities								
		Impact on other departments	None material								
		Equalities Implications	Assessed as 2. Broadly positive. Mitigation actions identified for potential negative implications.								

PROPOSED DEPARTMENT: Community and Housing

Panel	Ref	Description of Saving		Baseline Budget 21/22 £000	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	Risk Analysis Deliverability	Risk Analysis Reputational Impact	Type of Saving (see key)
HC&OP	CH106	Service/Section	Community & Housing								
		Description	Housekeeping - review of ancillary budget lines in the light of changed work patterns eg reduced use of printing, travel costs etc.	88	50	0	0	0	Medium	Low	SNS1
		Service Implication	Less flexibility in use of allocated budgets								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	May impact marginally on printing contracts								
		Equalities Implications	None								
HC&OP	CH107	Service/Section	Library & Heritage Service								
		Description	Increase income collection by reviewing all Fees and Charges and extending use of space in libraries by third party providers	444	0	60	0	0	High	Medium	SI1/SI2
		Service Implication	Ensures that a balanced budget can be achieved whilst not reducing service offering								
		Staffing Implications	None identified								
		Business Plan implications	Income generation is one of the services key performance indicators (KPI's) and targets will be reviewed in line with this saving proposal								
		Impact on other departments	Encouragement to use library spaces for external meetings instead of using non-Council owned premises								
		Equalities Implications	The review of fees and charges may lead to some increases. Due to the pandemic fees and charges have not been increased for two years and in this time the annual reviews have been paused. Within existing policies there are discounted costs for job seekers, elderly, disabled and children and young people. These concessions will continue and will not form part of the review. The scope of reviewing charges will only be around existing charges and will not look to introduce any new service charges.								

PROPOSED DEPARTMENT: Community and Housing

Panel	Ref	Description of Saving		Baseline Budget 21/22 £000	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	Risk Analysis Deliverability	Risk Analysis Reputational Impact	Type of Saving (see key)
HC&OP	CH108	Service/Section	Commissioning and Market Development	0	0	25	0	0	Medium	Low	SI2
		Description	Self-Funder Brokerage Offer								
		Service Implication	None material								
		Staffing Implications	None material								
		Business Plan implications	Not currently in Business Plan, but is consistent with future iteration of Business Plan given recent Govt. announcements relating to future offer to private funders of social care								
		Impact on other departments	None material								
		Equalities Implications	Assessed as 1: No adverse impacts identified and some potential for positive impact								
HC&OP	CH109	Service/Section	Adult Social Care	43,000	100	0	0	0	Low	Low	SNS1
		Description	Placements								
		Service Implication	Previous savings targeted at the placements budget have over achieved and this saving will be achieved by taking part of that underspend as a saving								
		Staffing Implications	None								
		Business Plan implications	None								
		Impact on other departments	None								
		Equalities Implications	None								

PROPOSED DEPARTMENT: Community and Housing

Panel	Ref	Description of Saving		Baseline Budget 21/22 £000	2022/23 £000	2023/24 £000	2024/25 £000	2025/26 £000	Risk Analysis Deliverability	Risk Analysis Reputational Impact	Type of Saving (see key)
HC&OP	CH110	Service/Section	Commissioning and Market Development	0	50	0	0	0	Low	Low	SP1
		Description	Commissioning efficiencies arising from reprocurring a high cost service								
		Service Implication	None material								
		Staffing Implications	None material								
		Business Plan implications	Consistent with Business Plan priorities								
		Impact on other departments	None material								
		Equalities Implications	Assessed as 1: No adverse impacts identified								
HC&OP	CH111	Service/Section	Commissioning and Market Development	1,544	0	65	0	0	Medium	Low	SS1
		Description	Commissioning staffing efficiencies								
		Service Implication	Will involve changes to the model of commissioning across C&H but it is intended that overall outcomes are improved and service delivery functions better supported as a result.								
		Staffing Implications	Intention is to deliver efficiency by remodeling functions. Any in scope vacancies will be held for deletion in order to avoid possible redeployment or redundancy.								
		Business Plan implications	None material								
		Impact on other departments	None material. May be opportunities to align wider commissioning functions.								
		Equalities Implications	Currently assessed as a 2, but will need to be revisited once scope is determined (early 2022/23)								
Total Community and Housing Savings 2022-26					300	800	0	0			

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IMPACT OF UNACHIEVED SAVINGS ON MTFS 2022-23

Department	Unachieved 2020/21 Savings	Unachieved 2021/22 Savings	Unachievable '2022/23 Total	Unachiev able '2023/24 Total	Unachiev able '2024/25 Total	Unachiev able '2025/26 Total
	£000	£000	£000	£000	£000	£000
Corporate Services	658	95	753	0	0	0
Children Schools and Families	0	400	400	0	0	0
Community and Housing	128	860	988	0	0	0
Environment and Regeneration	0	0	0	0	0	0
Total	786	1,355	2,141	0	0	0
E&R EBC Saving (cumulative)			1500	900	325	325
Total Unachieved Savings			3,641	900	325	325

ENVIRONMENT AND REGENERATION UNACHIEVABLE SAVING

		2021/22 £000	2022/23 £000	2023/24 £000	2024/25 £000
ENV2021-04 ENV2021-04	Parking - EBC	750	750	(150)	(135)
	Parking - EBC	0	0	(450)	(440)
	Total	750	750	(600)	(575)
	Cumulative total	750	1,500	900	325

DEPARTMENT: CORPORATE SERVICES SAVINGS PROGRESS 2021/22

Ref	Description of Saving	2022/23 Savings Expected £000	2022/23 Expected Shortfall £000	22/23 RAG	Comments
2018-19 CS07	Retender of insurance contract	0	25	A	Expected saving to be reviewed following six schools leaving the insurance SLA, new contract has delivered cost savings but there is shortfall against the budgeted saving due to original pressures in the budget
Human Resources					
2019-20 CS26	Review of contract arrangements	50	70	A	Delayed start of new contract arrangements due to covid. New contract arrangements to be agreed during this year in order for it to come into effect for 2022/23

DEPARTMENT: CHILDREN, SCHOOLS AND FAMILIES - PROGRESS ON SAVINGS 21-22

Ref	Description of Saving	2022/23 Savings Expected £000	2022/23 Expected Shortfall £000	22/23 RAG	Comments
CSF2019-12	Review of public health commissioned services	0	400		This saving is unachievable as it is related to a saving in Public Health related to recommissioning integrated service that didn't occur

DEPARTMENT: COMMUNITY & HOUSING SAVINGS PROGRESS 2021/22

Ref	Description of Saving	2022/23 Savings Expected £000	2022/23 Expected Shortfall £000	22/23 RAG	Comments
CH94	Integration- Merton Health & Care Together Partnership Programme	40	460	G	Changes in the health landscape make savings through integrated working more difficult to deliver at this time. This will be kept under review as the new ICS arrangements emerge
CH95	Public Health	100	400	G	The impact of COVID and provider issues make this undeliverable at this time.
TOTAL UNACHIEVED SAVINGS 2021/22			1,355		

DEPARTMENT: CORPORATE SERVICES SAVINGS PROGRESS 2020/21					
Ref	Description of Saving	2022/23 Savings Expected £000	2022/23 Expected Shortfall £000	22/23 RAG	Comments
2018-19 CS07	Retender of insurance contract	7	43	A	Expected saving to be reviewed following six schools leaving the insurance SLA, new contract has delivered cost savings but there is shortfall against the budgeted saving due to original pressures in the budget
2018-19 CS12	SLLp - reduction in legal demand	0	50	A	Saving to be reviewed to determine level of achievability and if replacement may be required
2019-20 CS14	impose criminal litigation cap at 20k	0	20	A	Saving to be reviewed to determine level of achievability and if replacement may be required
2019-20 CS15	reduce civil litigation legal support by 50%	0	45	A	Saving to be reviewed to determine level of achievability and if replacement may be required
2019-20 CS13	Improved collection of HB overpayments and reduce Bad Debt Provision	0	500	R	Saving removed from 2021/22 and deferred to 2022/23 per December 2020 Cabinet report
DEPARTMENT: COMMUNITY & HOUSING SAVINGS PROGRESS 2020/21					
Ref	Description of Saving	2022/23 Savings Expected £000	2022/23 Expected Shortfall £000	22/23 RAG	Comments
Adult Social Care					
CH76	OPMH Staffing	0	100		We need to review the demand for MH services with the trust due to C19. Further work is required to establish the necessary resourcing
CH87	Mascot Income	72	28		MASCOT income has fallen due to cancelled services
TOTAL UNACHIEVED SAVINGS 2020/21			786		

SUMMARY OF EQUALITIES ASSESSMENTS - SAVINGS TO CABINET 6 December 2021

SAVINGS REFERENCE	CABINET	DEPARTMENT	SAVING	OUTCOME
2022-23 CS01	06 December 2021	Corporate Services	Resources - Reduction to consultancy held with Director's budget	1
2022-23 CS02	06 December 2021	Corporate Services	Resources - Reduction to Resources AD budget various running costs budgets, eg subscriptions	1
2022-23 CS03	06 December 2021	Corporate Services	Resources - Reduce contribution to the insurance provision	1
2022-23 CS04	06 December 2021	Corporate Services	Human Resources - Increased schools payroll buy-back income and reduced payroll postage spend	1
2022-23 CS05	06 December 2021	Corporate Services	Customers, Policy and Improvement - Increase income budget in Registrars service	1
2022-23 CS06	06 December 2021	Corporate Services	Customers, Policy and Improvement - Reduction in cash collection costs	1
2022-23 CS07	06 December 2021	Corporate Services	Customers, Policy and Improvement - Rationalisation of Merton Link budgets	1
2022-23 CS08 & 2022-23 CS12	06 December 2021	Corporate Services	Customers, Policy and Improvement/Corporate Governance - Delete Information Governance post	1
2022-23 CS09	06 December 2021	Corporate Services	Corporate Governance - Reduce various AD budget running expenses	1
2022-23 CS10	06 December 2021	Corporate Services	Corporate Governance - Electoral services - reduction in canvass expenses and postage	1
2022-23 CS11	06 December 2021	Corporate Services	Corporate Governance - Increase legal third party income, eg s.106 agreements	1
2022-23 CS13	06 December 2021	Corporate Services	Corporate items - Reduction to corporately funded items budget	1
CSF1-22/23	06 December 2021	Children, Schools and Families	Direct procurement of services previously within schools PFI contract	1
CSF2-22/23	06 December 2021	Children, Schools and Families	CSF - Housekeeping	1
CSF3-22/23	06 December 2021	Children, Schools and Families	Education Inclusion - Streamlining activities	2
CSF4-22/23	06 December 2021	Children, Schools and Families	CSC- demand management and commissioning	1
ENV2022-23 01	06 December 2021	Environment and Regeneration	Food waste contract savings	1
ENV2022-23 02	06 December 2021	Environment and Regeneration	Raynes Park New Lease arrangements	1
ENV2022-23 03	06 December 2021	Environment and Regeneration	Deen City Farm - Reduction in grant by 50%	2
ENV2022-23 04	06 December 2021	Environment and Regeneration	School Streets income	2
ENV2022-23 05	06 December 2021	Environment and Regeneration	Utilities income from highways licences	1
ENV2022-23 06	06 December 2021	Environment and Regeneration	JC Decaux - additional advertising income	1
ENV2022-23 07	06 December 2021	Environment and Regeneration	PPA income (Regeneration generated)	1
ENV2022-23 08	06 December 2021	Environment and Regeneration	Rent Reviews	1
CH104	06 December 2021	Community and Housing	Adult Social Care - Discharge to Assess	2
CH105	06 December 2021	Community and Housing	Commissioning and Market Development - Increasing take up of Direct Payments	2
CH106	06 December 2021	Community and Housing	Community & Housing - Housekeeping - review of ancillary budget lines	1
CH107	06 December 2021	Community and Housing	Library & Heritage Service: Increase income - review all Fees and Charges and extend use of space	1
CH108	06 December 2021	Community and Housing	Commissioning and Market Development: Self-Funder Brokerage Offer	1
CH109	06 December 2021	Community and Housing	Adult Social Care - Placements	2
CH110	06 December 2021	Community and Housing	Commissioning & Market Development - Commissioning efficiencies from reprocurring a high cost service	1
CH111	06 December 2021	Community and Housing	Commissioning & Market Development - Commissioning staffing efficiencies	2

Equality Analysis



Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	A series of Resources Division corporate savings (2022-23 onwards CS 1,2,3,4,5,6,7,9,10,11&13)
Which Department/ Division has the responsibility for this?	Corporate Services

Stage 1: Overview																							
Name and job title of lead officer	Roger Kershaw. AD Resources																						
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	<p>Various savings in back office costs:-</p> <table border="0"> <tr> <td>Reduction in consultancy budget</td> <td>£10,000</td> </tr> <tr> <td>Reduced contribution to Insurance provision</td> <td>£15,000</td> </tr> <tr> <td>Cash collection costs</td> <td>£20,000</td> </tr> <tr> <td>Miscellaneous savings (eg. Subscriptions)</td> <td>£15,000</td> </tr> <tr> <td>Increased schools payroll buyback</td> <td>£15,000</td> </tr> <tr> <td>Increased income budget in Registrars</td> <td>£32,000</td> </tr> <tr> <td>Rationalization of Merton Link Budgets</td> <td>£20,000</td> </tr> <tr> <td>Reduction in AD running costs</td> <td>£3,000</td> </tr> <tr> <td>Increased legal third party income</td> <td>£5,000</td> </tr> <tr> <td>Reduction in Corporately funded items</td> <td>£50,000</td> </tr> <tr> <td>Reduction in Electoral canvassing postage costs</td> <td>£15,000</td> </tr> </table>	Reduction in consultancy budget	£10,000	Reduced contribution to Insurance provision	£15,000	Cash collection costs	£20,000	Miscellaneous savings (eg. Subscriptions)	£15,000	Increased schools payroll buyback	£15,000	Increased income budget in Registrars	£32,000	Rationalization of Merton Link Budgets	£20,000	Reduction in AD running costs	£3,000	Increased legal third party income	£5,000	Reduction in Corporately funded items	£50,000	Reduction in Electoral canvassing postage costs	£15,000
Reduction in consultancy budget	£10,000																						
Reduced contribution to Insurance provision	£15,000																						
Cash collection costs	£20,000																						
Miscellaneous savings (eg. Subscriptions)	£15,000																						
Increased schools payroll buyback	£15,000																						
Increased income budget in Registrars	£32,000																						
Rationalization of Merton Link Budgets	£20,000																						
Reduction in AD running costs	£3,000																						
Increased legal third party income	£5,000																						
Reduction in Corporately funded items	£50,000																						
Reduction in Electoral canvassing postage costs	£15,000																						
2. How does this contribute to the council's corporate priorities?	Assists with balancing the budget.																						
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners,	None																						

stakeholders, the workforce etc.	
4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?	None

DRAFT

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

The proposals represent back office savings and there will be no impact on the protected characteristics.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age		X		X	. No impact
Disability		X		X	. No impact
Gender Reassignment		X		X	. No impact
Marriage and Civil Partnership		X		X	. No impact
Pregnancy and Maternity		X		X	. No impact
Race		X		X	. No impact
Religion/ belief		X		X	. No impact
Sex (Gender)		X		X	. No impact
Sexual orientation		X		X	. No impact
Socio-economic status		x		X	. No impact

7. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?
No impact						

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

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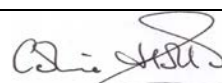
OUTCOME 1

OUTCOME 2

OUTCOME 3

OUTCOME 4

Stage 5: Sign off by Director/ Head of Service

Assessment completed by	Roger Kershaw, AD Resources	Signature: Roger Kershaw	Date: 25.11.21
Improvement action plan signed off by Director/ Head of Service	Caroline Holland (TBC)	Signature: 	Date:

EQUALITIES TEST OF RELEVANCE AND INITIAL SCREENING

Savings Reference: 2022-23 CS08 and 2022-23 CS12 Corporate Governance – Information Team



This form should be completed in line with the Equality Analysis guidance available on the Intranet	
EA completed by: (Give name and job title)	Louise Round, Managing Director, South London Legal Partnership
EA to be signed off by: (Give name and job title)	
Department/ Division:	Governance, Corporate Services
Team:	Information Governance
EA completed on:	10 May 2021

Assessing Functions, Policies, Proposed Policies and Procedures for their Relevance (due regard) to the General Duties of the Equality Act 2010.

Relevance Statements – the following statements may help you to determine whether the function/service is relevant to the aims of the Public Sector Equality Duty:

- The outcome(s) of the activity directly and significantly impact on people
- The activity affects some groups of people or communities and not others
- Particular groups of people or communities could be disadvantaged by the function / service
- They activity affects how the services are delivered
- The activity presents a high risk to the Council's public reputation
- The activity relates to an area where there are known inequalities

Protected Characteristics - Key:

Age	A	Race	R
Disability	D	Religion or Belief	RB
Gender Reassignment	GR	Sex	S
Marriage and Civil Partnership	MCP	Sexual Orientation	SO
Pregnancy and Maternity	PM		

Name of Function / Service	Which Protected Characteristic(s) is your function / service relevant to? Tick (✓) all that apply.									Which aims of the Public Sector Equality Duty (PSED) are relevant to your function/service? Can your function/service: Tick (✓) all that apply.		
	A	D	GR	MCP	PM	R	RB	S	SO	Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act 2010?	Advance equality of opportunity between people who share a protected characteristic and those who do not?	Foster good relations between people who share a protected characteristic and those who do not?
Information Governance	x	x	x	x	x	x	x	x	x	x		x

If relevance to the Public Sector Equality Duty is established, you are required to undertake an Equality Analysis.

Initial Screening

<p>1. What are the aims, objectives, and desired outcomes of your proposals? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria for eligibility of service etc.).</p>	<p>To achieve savings and to put in place a more logical operating structure, optimising synergies between different council teams.</p>			
<p>2. Who are the main people/groups affected by your proposals? (Consider who are the internal and external customers)</p>	<p>The main impact is on staff whose reporting lines will change. There will be no direct impact on external customers although it is hoped the more efficient operating model will enable the teams to respond more effectively to residents' demand/</p>			
<p>3. What data, information, evidence, research, statistics, surveys, and consultation(s) have you considered to undertake this screening?</p>	<p>Only staff demographics where available</p>			
<p>4. Is there evidence to suggest that your proposal(s) could affect some groups of people in different ways?</p>	<p>Yes</p>		<p>Explain the reason for your decision</p>	
	<p>No</p>	<p>x</p>		<p>This is an internal service, with only one job at risk.</p>

Assessing Impact


Please indicate how the proposals affect the Protected Characteristics listed below:

If you have identified potential negative impact(s) above, then it is necessary to complete an Equality Analysis. If there is no negative

	Positive Impact	Negative Impact	Neither	Reason / Comment / Evidence
Age			x	
Disability			x	
Gender Reassignment			x	
Marriage and Civil Partnership			x	
Pregnancy and Maternity			x	
Race			x	
Religion or Belief			x	
Sex			x	
Sexual Orientation			x	

impact you do not need to complete an Equality Analysis.

Outcome of screening	Not necessary
Lead Officer	Louise Round
Director/Head of Service	Caroline Holland

Signed	
Dated	10 May 2021

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Equality Analysis



Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Direct procurement of services previously within schools PFI contract (CSF1 – 22/23)
Which Department/ Division has the responsibility for this?	CSF / Education and Early Help

Stage 1: Overview	
Name and job title of lead officer	Tom Procter
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	In September 2021 the council agreed a change to the four schools PFI contract to remove the 'soft services' facilities management element from the contract. The council is therefore able to procure these services directly at better value for money and share the savings with schools
2. How does this contribute to the council's corporate priorities?	Support the council in meeting its savings targets and balancing its budget
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	None – the services will be of at least equivalent quality but the council can procure with better value for money by procuring directly rather than under the previous arrangements
4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?	No

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

As there is not expected to be an impact on services to anyone there will be no impact on the protected characteristics.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies Positive impact		Tick which applies Potential negative impact		Reason Briefly explain what positive or negative impact has been identified
	Yes	No	Yes	No	
	Age		*		
Disability		*		*	
Gender Reassignment		*		*	
Marriage and Civil Partnership		*		*	
Pregnancy and Maternity		*		*	
Race		*		*	
Religion/ belief		*		*	
Sex (Gender)		*		*	
Sexual orientation		*		*	
Socio-economic status		*		*	

7. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 4: Conclusion of the Equality Analysis

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Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

OUTCOME 1

OUTCOME 2

OUTCOME 3

OUTCOME 4

Stage 5: Sign off by Director/ Head of Service

Assessment completed by	Tom Procter, Head of Contracts and School Organisation	Signature: T Procter	Date: 19/11/2021
Improvement action plan signed off by Director/ Head of Service	Elizabeth Fitzpatrick, Assistant Director, Education and Early Help	Signature: E. Fitzpatrick	Date: 1/12/21

Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Efficiencies that can be found within the Education budgets, following changed work patterns started during the pandemic (CSF2 – 22/23)
Which Department/ Division has the responsibility for this?	Education/Children Schools and Families

Stage 1: Overview	
Name and job title of lead officer	Elizabeth Fitzpatrick, Assistant Director Education and Early Help
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	Savings from budgets across the division previously focused on photocopying and travel budgets. Practice changed during the pandemic resulting in permanent, and more effective ways of working. These more effective ways of working (less travel between sites, less reliance on paper versions of documents) can provide us with efficiencies.
2. How does this contribute to the council's corporate priorities?	Support the council in meeting its savings targets and balancing its budget
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	These efficiencies will not negatively effect the children and young people supported by these services.
4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?	The responsibility for these services is not shared beyond the Education Division..

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

Tracking of budgets over the past 18 months (including the past six months when services have returned to a new 'normal') have indicated that services can be maintained whilst reducing the need for travel between sites, and the need for photocopying. Because these efficiencies will not affect services to all children, it will not impact negatively on those with protected characteristics.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age		√		√	
Disability		√		√	
Gender Reassignment		√		√	
Marriage and Civil Partnership		√		√	
Pregnancy and Maternity		√		√	
Race		√		√	
Religion/ belief		√		√	
Sex (Gender)		√		√	
Sexual orientation		√		√	
Socio-economic status		√		√	

7. If you have identified a negative impact, how do you plan to mitigate it?

Not applicable

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have 'due regard' and you are advised to seek Legal Advice.**
- Outcome 4** – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

Stage 5: Improvement Action Plan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources ?	Lead Officer	Action added to divisional/ team plan?

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome

- The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed.

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	Elizabeth Fitzpatrick/ AD Education and Early Help	Signature: <i>E.Fitzpatrick</i>	Date: 1/12/21
Improvement action plan signed off by Director/ Head of Service	Elizabeth Fitzpatrick/ AD Education and Early Help	Signature: <i>E.Fitzpatrick</i>	Date: 1/12/21

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Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Efficiencies that can be found within the Education Inclusion budgets, where there have been some historical underspends. (CSF3 – 22/23)
Which Department/ Division has the responsibility for this?	Education/Children Schools and Families

Stage 1: Overview	
Name and job title of lead officer	Keith Shipman, Head of Education Inclusion
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	<ul style="list-style-type: none"> 1) £1000 savings from nurse post – cost of provision is £1000 less than budget 2) £3000 savings from supervision of VBS – cost of provision is £3000 less than budget 3) £12,500 from activities budget (My Futures) – we will replace some face to face activities with online engagement activities for NEET young people. This approach was found to work well (and was preferred) by certain groups during Covid. 4) £13,500 from Youth Service – efficiencies.
2. How does this contribute to the council's corporate priorities?	Support the council in meeting its savings targets and balancing its budget
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	These efficiencies will not negatively effect the children and young people supported by these services. The children and young people served are NEET young people, young people supported by the Youth Service (aged 9-25).
4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?	The responsibility for these services is not shared.

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

Date considered includes the profile of users of services. Because these efficiencies will not negatively impact any young people, no particular protected characteristics are disproportionately impacted.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age		√		√	
Disability	√			√	Young people with disabilities accessing online (preferred by some)
Gender Reassignment		√		√	
Marriage and Civil Partnership		√		√	
Pregnancy and Maternity		√		√	
Race		√		√	
Religion/ belief		√		√	
Sex (Gender)		√		√	
Sexual orientation		√		√	
Socio-economic status		√	√		Young people need access to devices to be able to engage with online activity, which is not necessarily affordable by all.

7. If you have identified a negative impact, how do you plan to mitigate it?

We are still doing some face to face activities – young people unable to afford devices would be invited to these.

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have 'due regard' and you are advised to seek Legal Advice.**
- Outcome 4** – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources ?	Lead Officer	Action added to divisional/ team plan?
Disadvantaged young people unable to afford devices to access online activities	Invite to face to face	All eligible young people able to engage; NEET levels will stay low	Monitored annually		Keith Shipman	Not necessary

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Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome [add](#) Assessment

- Some young people will be positively impacted by these actions
- Those that might be negatively impacted will be able to access activities on a face to face basis

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	Keith Shipman/ Head of Education Inclusion	Signature: <i>K.Shipman</i>	Date: 18/11/21
Improvement action plan signed off by Director/ Head of Service	Elizabeth Fitzpatrick/ AD Education and Early Help	Signature: <i>E.Fitzpatrick</i>	Date: 18/11/21

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Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	CSC Placements - demand management and commissioning (CSF4 – 22/23)
Which Department/ Division has the responsibility for this?	Children, Schools and Families

Stage 1: Overview	
Name and job title of lead officer	
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	<p>To address high cost placements of some of our young people in residential settings.</p> <p>Ensure young people’s needs are met through a robust review of their placement and sharing expertise from education, health and social care.</p> <p>Review and make changes to the commissioning arrangements and our offer to care leavers in Semi-Independent Accommodation (SIA) and how we support them.</p>
2. How does this contribute to the council’s corporate priorities?	Identifying efficiencies and overspend and support the council in meetings its savings targets.
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	<p>Children and young people in residential placements. Care leavers in SIA</p> <p>Range of partners and agencies responsible for care of looked-after children.</p>
4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?	<p>Members of Children Schools and Families and Community and Housing will share responsibility:</p> <ul style="list-style-type: none"> Assistant Director Children’s Social Care (Co-Chair) Assistant Director Education and Early Help (Co-Chair) Head of Service – Corporate Parenting Head of Service – Special Educational Needs and Access (Vice-Chair and Education decision taker) Children’s Continuing Care Manager/DCO (Health decision taker) Service Manager – Social Care SEN Manager Virtual School Head (or Deputy)

	<p>Housing and adults also have a responsibility as they have a duty of care towards care leavers (who are adults)</p>
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Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

The data relates to a nominal list of young people currently placed with complex packages and/or Out of Authority (OOA) residential placements.

Additional documents reviewed:

Merton Joint Agency Panel (JAP) Terms of Reference

Protocol Relating to Jointly Funded Placements for Children with Special Educational Needs and/or Complex Health Needs

DMT report Accommodation strategy for care experienced young people

The proposal will not negatively impact children and young people as the intention of the work is to improve the quality of service.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age				X	The changes relates to a nominal list of young people currently placed with complex packages and/or Out of Authority (OOA) residential placements. The proposal will not negatively impact children and young people as the intention of the work is to improve the quality of service.
Disability				X	The changes relates to a nominal list of young people currently placed with complex packages and/or Out of Authority (OOA) residential placements. The proposal will not negatively impact children and young people as the intention of the work is to improve the quality of service.
Gender Reassignment				X	The changes relates to a nominal list of young people currently placed

					with complex packages and/or Out of Authority (OOA) residential placements. The proposal will not negatively impact children and young people as the intention of the work is to improve the quality of service.
Marriage and Civil Partnership				X	The changes relates to a nominal list of young people currently placed with complex packages and/or Out of Authority (OOA) residential placements. The proposal will not negatively impact children and young people as the intention of the work is to improve the quality of service.
Pregnancy and Maternity				X	The changes relates to a nominal list of young people currently placed with complex packages and/or Out of Authority (OOA) residential placements. The proposal will not negatively impact children and young people as the intention of the work is to improve the quality of service.
Race				X	The changes relates to a nominal list of young people currently placed with complex packages and/or Out of Authority (OOA) residential placements. The proposal will not negatively impact children and young people as the intention of the work is to improve the quality of service.
Religion/ belief				X	The changes relates to a nominal list of young people currently placed with complex packages and/or Out of Authority (OOA) residential placements. The proposal will not negatively impact children and young people as the intention of the work is to improve the quality of service.
Sex (Gender)				X	The changes relates to a nominal list of young people currently placed with complex packages and/or Out of Authority (OOA) residential placements. The proposal will not negatively impact children and young people as the intention of the work is to improve the quality of service.
Sexual orientation				X	The changes relates to a nominal list of young people currently placed with complex packages and/or Out of Authority (OOA) residential placements. The proposal will not negatively impact children and young people as the intention of the work is to improve the quality of service.
Socio-economic status				x	The changes relates to a nominal list of young people currently placed with complex packages and/or Out of Authority (OOA) residential placements. The proposal will not negatively impact children and young people as the intention of the work is to improve the quality of service.

7. If you have identified a negative impact, how do you plan to mitigate it?

A range of mitigations will be identified through the Merton Joint Agency Panels with the following key principles at the heart of the panels' work:

- CYP needs are generally best met within their family, home, school and local community.
- Where local services are not available, the service should be as close to Merton as possible and the Panel will seek assurance as to how local and family links will be maintained.
- A person centred, outcomes-based approach that seeks to promote the rights, independence, choice and inclusion of the service user and carers will be adopted at all times.
- The Panel will aim to minimise the number of residential placements made in line with the core principle (point 1 above)
- The Panel will aim to ensure that where residential providers are used they meet statutory regulations and are able to achieve the identified outcomes for the CYP.
- Packages and placements are made with a best value and value for money approach and having regard to the Authority's relevant Commissioning Frameworks and in accordance with EU procurement requirements
- Value for Money Reviews of CYP placed OOA will always include consideration of the appropriateness of the placement, statutory agency plans (Care Plans, Education Health and Care Plan (EHCP) Annual Reviews, PEPs, Support Plans etc.), NHS processes, value for money and the possibility of returning to local provision as a fundamental element.
- The savings proposed by the review of the SIA commissioning arrangements have proposed that a better service will be provided to our customers through better utilising our resources.

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Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your**

proposed action is in line with the PSED to have 'due regard' and you are advised to seek Legal Advice.

Outcome 4 – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

DRAFT

Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?
NA						

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome [1](#) Assessment

The proposal aims to address high cost placements of some of our young people in residential settings whilst ensuring that young people's needs are met through a robust review of their placement and sharing expertise from education, health and social care

The changes relates to a nominal list of young people currently placed with complex packages and/or Out of Authority (OOA) residential placements. The proposal will not negatively impact children and young people as the intention of the work is to improve the quality of service whilst ensuring best value for money around our commissioning arrangements for these placements.

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	David Michael	Signature:	Date:
Improvement action plan signed off by Director/ Head of Service	Dheeraj Chibber	Signature:	Date:

DRAFT

Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Food waste disposal contract (Anaerobic Digestion) (ENV2022-23 01)
Which Department/ Division has the responsibility for this?	Public Space – Waste Services

Stage 1: Overview

Name and job title of lead officer	Charles Baker – Strategy and Commissioning Manger waste services
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	Following the successful procurement for a new processing facility to manage the treatment of Merton's Kerbside collected food waste utilising anaerobic digestion technology thus diverting this waste stream from landfill / Energy recovery
2. How does this contribute to the council's corporate priorities?	This ensures we deliver and maintain our current recycling performance and contribute to the Council Carbon reduction plan.
3. Who will be affected by this proposal? For example, who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	None – The service will still meet the needs of our residents and maintain the scheduled weekly collection of food waste from the kerbside
4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?	As part of our partnership arrangements with the South London Waste Partnership we have advised the Joint Waste Committee along with seeking approval from Cabinet. Our Service provider, Veolia will need to be advised of our intention and direct the collection crews to the new disposal point in Beddington.

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

Full procurement and tender exercise completed and financial impact analysed at a local borough level.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age		X		X	
Disability		X		X	
Gender Reassignment		X		X	
Marriage and Civil Partnership		X		X	
Pregnancy and Maternity		X		X	
Race		X		X	
Religion/ belief		X		X	
Sex (Gender)		X		X	
Sexual orientation		X		X	
Socio-economic status		X		X	

7. If you have identified a negative impact, how do you plan to mitigate it?

N/A . This proposal will not see any impact or change to our residents . for avoidance of doubt this savings is achieved through the disposal of waste and not on the collection service.

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have 'due regard' and you are advised to seek Legal Advice.**
- Outcome 4** – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

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Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes


10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome [add](#) Assessment

Please include here a summary of the key findings of your assessment.

- What are the key impacts – both negative and positive – you have identified?
- Are there any particular groups affected more than others?
- What course of action are you advising as a result of this assessment?
- If your EA is assessed as Outcome 3 and you suggest to proceeding with your proposals although a negative impact has been identified that may not be possible to fully mitigate, explain your justification with full reasoning.

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	Charles Baker – waste strategy and commissioning manger	Signature:	Date:17 11 2021
Improvement action plan signed off by Director/ Head of Service	John Bosley – Assistant Director Public Space	Signature: 	Date: 18 Nov 2021

DRAFT

Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Raynes Park Sports Ground - new lease arrangement (ENV2022-23 02)
Which Department/ Division has the responsibility for this?	Environment & Regeneration Public Space

Stage 1: Overview	
Name and job title of lead officer	John Bosley, Assistant Director of Public Space
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	Savings achieved through the new lease arrangements for the Raynes Park Sports Ground by the Wimbledon Club for the provision of community based sporting at the site. The 2022/23 lease provision accommodates the rent reduction period agreed, with the full annual impact being achieved in 2023/24.
2. How does this contribute to the council's corporate priorities?	The proposal aims to meet the council's corporate priorities by providing improved community sporting activity with improvements and security of improved facilities for younger people. The delivery of the proposal is also in line with the Playing Pitch Strategy and will aid in the developing priorities from Your Merton.
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	Youth groups and organised sporting groups that currently utilise the site as well as school groups through the provision of free access periods will benefit from the proposed offer at this facility, positively. Further supporting the improvement of the site to develop healthier communities.
4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?	The proposal is for the long term leasing of the facility to the Wimbledon Club to operate a community sporting facility. The council will receive an income through the leasing of the site. The proposal will be a partnership between the council (lessor) and the Wimbledon Club (lease).

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

Detailed assessment of the business case and provision of sporting, including the proposed community access agreement, was reviewed and negotiated during the commercial discussions at the bidder er stages. The assessment of the successful bid was positive, providing necessary development to the site and grounds, increased access to local schools for use of the site during prescribed hours, maintenance of community sport use and access to the site.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age	X			X	For all of the below; the proposal provides a strong way forward to develop the site which needs further investment whilst also provider an income stream to the council, which can only be viewed as a positive.
Disability	X			X	
Gender Reassignment	X			X	
Marriage and Civil Partnership	X			X	
Pregnancy and Maternity	X			X	
Race	X			X	
Religion/ belief	X			X	
Sex (Gender)	X			X	
Sexual orientation	X			X	
Socio-economic status	X			X	

7. If you have identified a negative impact, how do you plan to mitigate it?

None

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have 'due regard' and you are advised to seek Legal Advice.**
- Outcome 4** – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.


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Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome add Assessment
<p>Please include here a summary of the key findings of your assessment.</p> <ul style="list-style-type: none"> • What are the key impacts – both negative and positive – you have identified? • Are there any particular groups affected more than others? • What course of action are you advising as a result of this assessment? • If your EA is assessed as Outcome 3 and you suggest to proceeding with your proposals although a negative impact has been identified that may not be possible to fully mitigate, explain your justification with full reasoning.

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	John Bosley, Assistant Director of Public Space	Signature: 	Date: 18 Nov 2021
Improvement action plan signed off by Director/ Head of Service	Add name/ job title	Signature:	Date:

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Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Reduction in annual funding to Deen City Farm (ENV2022-23 03)
Which Department/ Division has the responsibility for this?	Environment & Regeneration Public Space

Stage 1: Overview	
Name and job title of lead officer	John Bosley, Assistant Director of Public Space
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	Savings proposal is to be achieved through the reduction of the annual grant received by Deen City Farm by 50%. It would be advised that consultation and support work is undertaken during 2022/23 to assist in finding alternative and supportive grant provision from external providers and / or other accessible grant funds.
2. How does this contribute to the council's corporate priorities?	The proposal aims to meet the council's corporate priorities by meeting the needs of savings to contribute to the MTFS as the provision of grant funding is non-statutory.
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	Affected by the proposal will be the Deen City Farm charity which provides a local riding school and farmyard in an urban environment. The negative impact of the proposal will place undetermined financial pressure that will need to be mitigated. It is planned within the proposal to work with the charity during the next year to determine if alternative funding can be secured to minimise the impact of the proposal.
4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?	The proposal is for the reduction in an annual grant fund to Deen City Farm. The provision is externally provided and is not aligned specifically to the service within Greenspaces or the statutory provision of services delivered by the council. Overall responsibility for the operations sits with the charity, Deen City Farm.

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

Detailed assessment of the impact of protected characteristics has not been undertaken. The grant funding for Deen City Farm is a historic contribution offered to the charity by the council but the business operates revenue generating activities, such as horse riding, small animal boarding and a café. It is envisaged that the negative reduction of grant funding will need to be consulted with charity during 2022/23 prior to applying the savings in 2023/24. During this time, the service will aim to support the finding of alternative funding to minimise the overall impact.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age		X		X	For all of the below; the reduction of grant funding will have an immediate & negative impact due to the inherent loss of 50% income issued to Deen City Farm in the form of a grant. This can only be seen as negative to the Organisation and, potentially, to the Council. However, the service will work with the charity to determine and, as possible, secure funding to mitigate impacts
Disability		X		X	
Gender Reassignment		X		X	
Marriage and Civil Partnership		X		X	
Pregnancy and Maternity		X		X	
Race		X		X	
Religion/ belief		X		X	
Sex (Gender)		X		X	
Sexual orientation		X		X	
Socio-economic status		X		X	

7. If you have identified a negative impact, how do you plan to mitigate it?

During 2022/23, the service will work with Deen City Farm to determine the availability of third-party support and/or funding that can be used to minimise the negative impact due to the reduction of funding. In addition, the review of charges and commercial opportunities can be assessed to possibly improve income to mitigate the overall impact.

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have 'due regard' and you are advised to seek Legal Advice.**
- Outcome 4** – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?
Funding reduction to support activity	The service to work with Deen City Farm during 2022/23 to mitigate funding reduction through external sources	Aiding Deen City Farm to secure additional funding from external parties / sources through establishment of regular meetings to seek alternative funding streams	Mar 23	Exisitng	Head of Parks Service	Yes

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Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink


This Equality Analysis has resulted in an Outcome [add](#) Assessment

Please include here a summary of the key findings of your assessment.

- What are the key impacts – both negative and positive – you have identified?
- Are there any particular groups affected more than others?
- What course of action are you advising as a result of this assessment?

- If your EA is assessed as Outcome 3 and you suggest to proceeding with your proposals although a negative impact has been identified that may not be possible to fully mitigate, explain your justification with full reasoning.

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Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	John Bosley, Assistant Director of Public Space	Signature: 	Date: 18 Nov 2021
Improvement action plan signed off by Director/ Head of Service	Add name/ job title	Signature:	Date:

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Equality Analysis



Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	The use of ANPR to enforce School Streets contraventions has been operational since 2019. In May 2021 the numbers of Schools who are part of the School Safety schemes increased from 3 to 28. It is anticipated that this policy will result is safer less polluted environments at schools. Due to the enforcement of these School location through ANPR, the affect is an anticipated increase in the number of Penalty Charge Notices being issued.(ENV2022-23 04)
Which Department/ Division has the responsibility for this?	Parking Services, Environment and Regeneration

Stage 1: Overview

Name and job title of lead officer	Ben Stephens, Head of Parking
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	<p>The aim of School Safety Zones is for there to be less activity in and around schools at dropping off and picking up times. This is done through communication and enforcement. Enforcement at present has requested in high PCN numbers being issued in 2021/22. It is anticipated that some compliance will take place in coming years, but some PCNs will continued to be issued in forthcoming years.</p> <p>ANPR enforcement and the issue of PCNs aims to deliver better compliance and driver behaviours in respect of moving traffic contraventions, which will reduce congestion, and lead to improved traffic flows and availability of spaces.</p> <p>Local authorities are not permitted to use PCN parking charges solely to raise income. When setting charges, we must instead focus on how the charges will contribute to delivering the Council’s traffic management and other policy objectives.</p> <p>This proposal supports the rationale of seeking to adjust driver behaviour and to ensure that we can provide a modern, efficient and environmentally sustainable transport policy for residents, visitors and businesses, now and in the future.</p>

	<p>There are a number of exemptions for eligible residents and individuals that require access to School Street, including for example residents, careers and teachers.</p>
<p>2. How does this contribute to the council's corporate priorities?</p>	<p>Parking and Traffic Management This proposal is part of the important role Parking and transport policy has in managing the roads and wider travel needs of the public. Merton's policy links closely with the local Implementation Plan and the Mayors Transport Strategy, which sets out objectives in detail. It contributes in the following ways:</p> <ol style="list-style-type: none"> 1. Reduce congestion 2. Improve road safety 3. Improve air quality and meet EU quality standards 4. To meet the actions set out in the Merton Health and Wellbeing Strategy 2019 5. Adopt a healthy street approach 6. Promote healthier life styles and encourage more active travel 7. To ensure good parking management 8. To support the local economy 9. Providing funding for parking and wider transport scheme improvements
<p>Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.</p>	<p>The saving proposal will affect all motorists who drive within the borough, specifically those who drive into or through School Safety zones at the time of the restriction and receive a Penalty Charge Notice.</p> <p>There are a number of exemptions for eligible residents and individuals that require access to School Street, including for example residents, careers and teachers.</p>
<p>4. Is the responsibility shared with another department, authority or organisation? If</p>	<p>Enforcement of the School Street Zones is the responsibility of Parking Services . The principle of School Streets is a shared the responsibility with the following departments, organisations and partners. Future Merton, Highways and Transportation, Planning, Mayor of London, TfL, transport operators, Parking Services.</p>

so, who are the partners and who has overall responsibility?

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Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

The Council acknowledges that road safety and traffic flow along with accessibility for residents and visitors to enable them to move freely throughout the borough.

A number of key factors were considered included:

- (i) Air Quality hotspots
- (ii) Areas of high congestion
- (iii) Enforcement requirements
- (iv) Road safety

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Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age	X			X	<p>Positive Impact</p> <p>The proposals support the principle of effective traffic management for the whole population of and visitors to Merton.</p> <p>This includes the shift to more active and sustainable transport modes (such as walking, cycling and public transport) the impact of vehicle emissions and congestion on air quality, and demand for</p>

					<p>kerbside space, which form the backdrop of the policy direction.</p> <p><u>Potential Negative Impact</u></p> <p>None identified</p>
Disability	X			X	<p><u>Positive Impact</u></p> <p>The proposals support the principle of effective traffic management for the whole population of and visitors to Merton.</p> <p>This includes the shift to more active and sustainable transport modes (such as walking, cycling and public transport) the impact of vehicle emissions and congestion on air quality, and demand for kerbside space, which form the backdrop of the policy.</p> <p><u>Potential Negative Impact</u></p> <p>None identified</p>
Gender Reassignment	X			X	<p><u>Positive Impact</u></p> <p>The proposals support the principle of effective traffic management for the whole population of and visitors to Merton.</p> <p>This includes the shift to more active and sustainable transport modes (such as walking, cycling and public transport) the impact of vehicle emissions and congestion on air quality, and demand for kerbside space, which form the backdrop of the policy direction.</p> <p><u>Potential Negative Impact</u></p> <p>None identified</p>
Marriage and Civil Partnership	X			X	<p><u>Positive Impact</u></p> <p>The proposals support the principle of effective traffic management for the whole population of and visitors to Merton.</p> <p>This includes the shift to more active and sustainable transport modes (such as walking, cycling and public transport) the impact of vehicle emissions and congestion on air quality, and demand for kerbside space, which form the backdrop of the policy.</p>

					<p><u>Potential Negative Impact</u></p> <p>None identified</p>
Pregnancy and Maternity	X			X	<p><u>Positive Impact</u></p> <p>The proposals support the principle of effective traffic management for the whole population of and visitors to Merton. This includes the shift to more active and sustainable transport modes (such as walking, cycling and public transport) the impact of vehicle emissions and congestion on air quality, and demand for kerbside space, which form the backdrop of the polic.</p> <p><u>Potential Negative Impact</u></p> <p>None identified</p>
Race	X			X	<p><u>Positive Impact</u></p> <p>The proposals support the principle of effective traffic management for the whole population of and visitors to Merton. This includes the shift to more active and sustainable transport modes (such as walking, cycling and public transport) the impact of vehicle emissions and congestion on air quality, and demand for kerbside space, which form the backdrop of the policy.</p> <p><u>Potential Negative Impact</u></p> <p>None identified</p>
Religion/ belief	X			X	<p><u>Positive Impact</u></p> <p>The proposals support the principle of effective traffic management for the whole population of and visitors to Merton. This includes the shift to more active and sustainable transport modes (such as walking, cycling and public transport) the impact of vehicle emissions and congestion on air quality, and demand for kerbside space, which form the backdrop of the policy.</p> <p><u>Potential Negative Impact</u></p> <p>None identified</p>

Sex (Gender)	X			X	<p><u>Positive Impact</u></p> <p>The proposals support the principle of effective traffic management for the whole population of and visitors to Merton. This includes the shift to more active and sustainable transport modes (such as walking, cycling and public transport) the impact of vehicle emissions and congestion on air quality, and demand for kerbside space, which form the backdrop of the policy.</p> <p><u>Potential Negative Impact</u></p> <p>None identified</p>
Sexual orientation	X			X	<p><u>Positive Impact</u></p> <p>The proposals support the principle of effective traffic management for the whole population of and visitors to Merton. This includes the shift to more active and sustainable transport modes (such as walking, cycling and public transport) the impact of vehicle emissions and congestion on air quality, and demand for kerbside space, which form the backdrop of the policy.</p> <p><u>Potential Negative Impact</u></p>
Socio-economic status	X		X		<p><u>Positive Impact</u></p> <p>The proposals support the principle of effective traffic management for the whole population of and visitors to Merton.</p> <p>This includes the shift to more active and sustainable transport modes (such as walking, cycling and public transport) the impact of vehicle emissions and congestion on air quality, and demand for kerbside space, which form the backdrop of the policy.</p> <p><u>Potential Negative Impact</u></p> <p>Any increase in the cost or receiving a Penalty Charge Notice will have a negative financial impact on anyone who receives one. Individuals on a lower income will notice the increase in charge</p>

					more than individuals with higher incomes.
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7. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/team plan?
Socio-economic status	Inform resident/motorists of the School Street restrictions, to allow drivers to make an informed choice, when choosing to or not to adhere to parking regulations.	Communications direct with school and social media.	Ongoing	Existing	Ben Stephens	Yes

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

OUTCOME 1

OUTCOME 2

OUTCOME 3

OUTCOME 4

Stage 5: Sign off by Director/ Head of Service

Assessment completed by	Ben Stephens – Head of Parking Services	Signature: <i>Ben Stephens</i>	Date: 23 rd November 2021
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Stage 5: Sign off by Director/ Head of Service

Improvement action plan signed off by Director/ Head of Service

Chris Lee – Director of Environment and Regeneration

Signature:

Date: 23rg November 2021

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Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Budget Savings: Increased income from Street Permitting and Highways Advertising contract Savings ENV2022-23 05 and 06 and 07
Which Department/ Division has the responsibility for this?	E&R Future Merton

Stage 1: Overview	
Name and job title of lead officer	Paul McGarry, Head of Future Merton
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	Budget savings to be achieved through additional income through: Increased Street Permitting fees Additional income from Highway Advertising (switch to digital advertising) Increased PPA income from major planning apps (regeneration)
2. How does this contribute to the council's corporate priorities?	The proposal seeks to increase income and add value through exiting income streams.
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	The proposal benefits the authority through reduced baseline budgets (increased income) The proposal will not affect residents. Street permits are issued to developers and utility companies with fees being increased. PPA income is generated from developers and applicants and has no impact on residents.
4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?	N/A

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

An analysis of existing and proposed fees has been undertaken. The increased income is also based on uplifts from previous years, as a result of the recent team reorganization in Streetworks which allows for more focus on enforcement. There are now more permits and fines being issued through efficiencies. The income is not anticipated to negatively affect the general public as the permits are mostly for the activities of utility companies and developers undertaking works on the highway. The increased fee level for highways permitting may further incentivize contractors to complete works more quickly thus reducing any negative impact on all highway users.

Additional income is expected from the JC Decaux advertising contract. By switching sites to digital screens there will be an expected increase in revenue once the sites are live (2023). The increased income from digital advertising has no impact on protected characteristics.

Additional income is also expected from increased Planning Performance Agreement (PPA) income from the planning process associated with major regeneration schemes. The increased income from PPAs has no impact on protected characteristics.

Stage 3: Assessing impact and analysis

From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age				X	N/A for all groups – proposal is to increase income from fees. Fees are not from fining individuals, but commercial operators (utilities, developers etc) No anticipated impact on any individuals or protected characteristics.
Disability				x	As above
Gender Reassignment				x	As above
Marriage and Civil Partnership				X	As above
Pregnancy and Maternity				X	As above
Race				X	As above
Religion/ belief				X	As above

Sex (Gender)				X	As above
Sexual orientation				X	As above
Socio-economic status				X	As above

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7. If you have identified a negative impact, how do you plan to mitigate it?

N/A

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

Outcome 1 – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**

Outcome 2 – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**

Outcome 3 – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have 'due regard' and you are advised to seek Legal Advice.**

Outcome 4 – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in a Neutral [add](#) Assessment Outcome

- Increased income from fees relate to utility providers undertaking streetworks and switching existing on-street advertising sites to digital adverts. There is no anticipated equalities impact.

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	Paul McGarry Head of FutureMerton	Signature:PMcG	Date:24/11/21
Improvement action plan signed off by Director/ Head of Service	James McGinlay, Assistant Director for Sustainable Communities	Signature:JMcG	Date:24/11/21

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Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Proposed budget savings through additional commercial property rental income (ENV2022-23 08)
Which Department/ Division has the responsibility for this?	Environment and Regeneration

Stage 1: Overview	
Name and job title of lead officer	Jacquie Denton Interim Property Management & Review Manager
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	To undertake additional commercial property rent reviews to add income to the Council's revenue budgets
2. How does this contribute to the council's corporate priorities?	Direct additional supply of revenue funds.
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	Additional income from existing commercial property tenants
4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?	Finance and legal teams will have involvement with the property management and review team undertaking the majority of the actions.

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

Whilst we are aware that our commercial tenants represent a diverse range of equality groups. From our knowledge and experience of the properties and tenants within the council's commercial portfolio, there is no evidence that this additional income would have a detriment on any particular group. Rent reviews are implemented in line with the terms of the lease and professional guidance. We will work with tenants in applying any increase in rent and discuss payment plans for any back rent. The additional income will benefit residents by contributing to the Council's income

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age					None identified
Disability					None identified
Gender Reassignment					None identified
Marriage and Civil Partnership					None identified
Pregnancy and Maternity					None identified
Race					None identified
Religion/ belief					None identified
Sex (Gender)					None identified
Sexual orientation					None identified
Socio-economic status					None identified

7. If you have identified a negative impact, how do you plan to mitigate it?

None identified

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have ‘due regard’ and you are advised to seek Legal Advice.**
- Outcome 4** – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?
None identified						

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome [add](#) Assessment

Please include here a summary of the key findings of your assessment.

- What are the key impacts – both negative and positive – you have identified?
- Are there any particular groups affected more than others?
- What course of action are you advising as a result of this assessment?
- If your EA is assessed as Outcome 3 and you suggest to proceeding with your proposals although a negative impact has been identified that may not be possible to fully mitigate, explain your justification with full reasoning.

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	Add name/ job title	Signature:	Date:
Improvement action plan signed off by Director/ Head of Service	Add name/ job title	Signature:	Date:

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Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Integrated Discharge to Assess CH104
Which Department/ Division has the responsibility for this?	Community and Housing

Stage 1: Overview

Name and job title of lead officer	Phil Howell, Interim Assistant Director ASC
<p>1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)</p>	<p>Discharge to Assess from acute hospitals has evolved throughout the C-19 pandemic with the emergence and further updated national hospital discharge guidance. Within this guidance a set of consistent nationally understood pathways were set out. One of the core principals of both community discharges and discharges into bedded placements was that individuals should be moved into non-acute settings before a comprehensive assessment of their need is undertaken.</p> <p>Discharge to Assess has been a policy principle of health & care integration for many years with varying levels of successful implementation at local level. At the onset of COVID 19 and given the very different starting point of organisations and local systems, national funding was made available to smooth the ability of local systems to agree the discharge arrangements, to suitable placements, without needing to agree the financial responsibility at the point of discharge, sustaining placements and funding them for up to 6 weeks. This was later reduced to 4 weeks funding in September 2021. This removed one barrier to organisations working in a more integrated way. The national funding approach ended in September 2021. Local CCGs were given financial responsibility for their hospital discharges and national funding flowed to CCGs for management and distribution for the second half of the financial year 2021/22.</p> <p>From April 2022 local operating models and funding arrangements must be in place. Therefore, there is a necessity to look at the most effective and efficient discharge to assess model across Merton. Integrated pathway work had already started pre-pandemic and Merton has a good hospital discharge model, relative to other areas, achieving good outcomes for individuals and minimising delays in the system.</p> <p>The financial benefit at this stage has three potential outcomes those being:</p> <ul style="list-style-type: none"> • BCF Securing additional income to the local authority through integration routes e.g. additional

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	<ul style="list-style-type: none"> • Reduction in staff and wider costs through integrating a number of separate teams • Reduction in overall placement spend due to improved outcomes of successful reablement and reduced placements into residential and nursing care. <p>This proposal centres on re-starting that work to integrate the teams and services that operate within the 'intermediate care' arena. The proposals aim to provide a seamless interface between health and social care for people being discharged from hospital. It will centre on modelling an integrated service with both clarity of the health and social care roles required and also better use of the generic and wide ranging skill sets of professionals working in the teams in the current model. In integrating the workforce, it may be possible to integrate management functions at some levels as well as systems, facilities and budgets</p> <p>The proposals aim to further protect the Council's placement budget by supporting as many people to regain their independent living skills and have little or no reliance on the care system longer term.</p>
<p>2. How does this contribute to the council's corporate priorities?</p>	<p>The proposed saving will contribute to the overall achievement of the Council's medium term financial targets as well as the key strategic priority of protecting the health and wellbeing of vulnerable adults; in particular older people in Merton.</p>
<p>3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.</p>	<p>The employees in scope will be determined early in 2022/23. It will predominantly be Hospital to Home social work team, Reablement, and occupational therapy services. There will also be some of the ASC management structure in scope.</p> <p>Various community teams within the CLCH structures, primary care, CCG</p> <p>All Merton residents who require supported discharge from hospital</p>
<p>4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?</p>	<p>The responsibility for delivery of an integrated model is shared with our community health partner NHS Central London Community Healthcare Trust. Discharge to Assess pathway are also a shared whole-system responsibility within the South West London Integrated Care System. It is likely that local funding arrangements will need to be agreed between the local authority and the ICS at place to ensure D2A arrangements are provided on a financially stable footing. It is also likely that existing mechanisms such as the Better Care Fund and Improved Better Care fund will play a role in facilitation.</p> <p>Given the statutory responsibilities of the Care Act and our financial responsibilities it is most likely the Council would retain lead responsibility within an integrated service</p>

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

The in scope employees will be identified in early 2022/23 and a further iteration of this EIA will be completed at that time. This will include consideration of specific demographic and protected characteristic breakdown of the staff in scope.

More Widely:

Evidence of good practice models in D2A. Consultation of statutory and non-statutory guidance

Evidence and information on demand, capacity and outcomes of current operating model

It is anticipated in taking the above into account the proposal, whilst achieving the financial benefit will also achieve a positive impact for all residents, staff in scope and wider partners. From an equality duty perspective, D2A, as a process, is non-discriminatory.

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Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age		✓	✓		Until such time as the employees in scope are identified there is a small risk that there may be a negative impact.
Disability		✓	✓		As above
Gender Reassignment		✓	✓		As above
Marriage and Civil Partnership		✓	✓		As above
Pregnancy and Maternity		✓	✓		As Above

Race		✓	✓		As above
Religion/ belief		✓	✓		As above
Sex (Gender)		✓	✓		As above
Sexual orientation		✓	✓		As above
Socio-economic status		✓	✓		As above

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7. If you have identified a negative impact, how do you plan to mitigate it?

The EIA will be updated at the point when in scope employees are identified (early 2022/23) and any necessary mitigation will be put in place at that time. There will be indirect mitigations required by partners to this proposal.

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have ‘due regard’ and you are advised to seek Legal Advice.**
- Outcome 4** – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

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Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?
Until such time as the employees in scope are identified there is a small risk that there may be a negative impact.	Mitigation actions will be devised once in scope employees are identified. In any case, the Managing Workforce Change policy will be followed and staff supported appropriately.	TBC	TBC	TBC	Phil Howell	For 2022/23

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Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome 2 Assessment

Assessment demonstrates some risk of negative impacts, but will need to be reviewed in early 2022/23 once in scope staff are identified.

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	Phil Howell, Interim Assistant Director, ASC	Signature: PH	Date: 05.11.21
Improvement action plan signed off by Director/ Head of Service	Phil Howell, Interim Assistant Director, ASC	Signature:PH	Date: 03.11.21

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Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Increasing take up of Direct Payments to deliver improved choice and control for residents and better value for the Council CH105
Which Department/ Division has the responsibility for this?	Community and Housing

Stage 1: Overview

Name and job title of lead officer	Keith Burns
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	<p>To increase the proportion of people eligible for adult social care services who are provided with a Direct Payment rather than a commissioned package of care. Direct Payments offer greater choice and control over how an individual's needs are met both in terms of the types of services or support that can be arranged by the individual and by enabling access to a wider provider market than that commissioned by the Council.</p> <p>The increase in the proportion of people using a Direct Payment will be achieved in the following ways:</p> <ol style="list-style-type: none"> 1. Making Direct Payments the default option for new customers and when existing customers' needs change; 2. Improving our promotional materials (including in accessible formats and community languages) so that the benefits of Direct Payments are fully explained; 3. Improving internal processes so that Direct Payments are as easy as possible to access and manage on an ongoing basis; 4. Improving the 'look and feel' and accessibility of the Council's Personal Assistant register and increasing marketing activity to attract a larger number of people to register as Personal Assistants; 5. Improved relationships with voluntary sector partners, particularly those with a representative function, to help ensure that when issues are raised by individuals about the management of their Direct Payment these can be resolved quickly both for the benefit of the individual and to continually build trust and confidence in Direct Payments as a positive option for all.
2. How does this contribute to the council's corporate priorities?	Increased use of Direct Payments will generate savings that are intended to contribute to the overall savings target for the Council for the period 2022/23 and beyond.
3. Who will be affected by this	The primary group of customers affected are those who have been assessed as eligible for adult social care

<p>proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.</p>	<p>services. This group includes older people; adults with learning and/or physical disabilities; adults with mental health problems and other vulnerable people. Carers of the aforementioned cohorts may also be eligible for services in their own right.</p> <p>As at June 2021 the numbers of people in receipt of long term adult social care services were:</p> <p>18-65: 621 65+: 945</p> <p>One of the key benefits of Direct Payments is that they can enable individuals to arrange services that are better able to meet their specific needs and preferences.</p> <p>More broadly, residents employed, either directly as Personal Assistants or similar, or indirectly by home care and other social care agencies, will be affected in terms of employment opportunities.</p> <p>Direct Payments are administered by an in house Direct Payments Team. This team is resourced to manage a larger number of Direct Payment arrangements than are in place currently.</p>
<p>23. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?</p>	<p>The provision of adult social care services is a statutory responsibility for the Council. Voluntary and community sector partners can support us in explaining the benefits of Direct Payments and by supporting individuals who are using Direct Payments, but the overall responsibility is ours.</p>

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Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

- Data from reports generated in Mosaic (The Council's social care records system)
- National evidence from a broad range of sources (SCIE, Skills for Care, CQC and other sources) on the benefits of Direct Payments.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age	✓		✓		While Direct Payments provide greater choice and control and more opportunity to arrange services that are better tailored to an individual's characteristics (positive) they do also require a greater degree of responsibility for managing employees and payment arrangements (positive or negative). This may adversely impact the ability of some customers to take up the Direct Payments option, particularly if they do not have a representative willing to act on their behalf.
Disability	✓		✓		As above
Gender Reassignment	✓		✓		As above
Marriage and Civil Partnership		✓		✓	N/A
Pregnancy and Maternity		✓		✓	N/A
Race	✓		✓		As above
Religion/ belief	✓		✓		As above
Sex (Gender)	✓		✓		As above
Sexual orientation	✓		✓		As above

Socio-economic status	✓		✓		As above
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7. If you have identified a negative impact, how do you plan to mitigate it?

The Council offers two models of Direct Payment: in the first model, the Direct Payment is managed by the individual or their representative, while in the second model the Council undertakes this management function on behalf of the individual. In this second scenario, called a Merton Managed Account (MMA) the Council effectively takes on a large proportion of the ongoing maintenance of the Direct Payment (setting up payroll arrangements, paying invoices and so on) while still enabling the individual to have full choice and control over their care and support plan.

Where managing a Direct Payment would be a barrier to an individual (a negative impact) the MMA can be offered as a means of mitigating these barriers.

Individuals can also be signposted to a range of local voluntary sector organisations who can provide support in managing Direct Payments. The Council will also seek to improve the quality and accessibility of our support documentation, and to make this available in community languages and accessible formats, in order to provide additional support.

If, over time, the balance between models 1 and 2 changes we will review the allocation of roles within the Direct Payments team to ensure that a timely and high quality service can continue to be offered to all customers.

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have 'due regard' and you are advised to seek Legal Advice.**
- Outcome 4** – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

Stage 5: Improvement Action Plan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?
While Direct Payments provide greater choice and control and more opportunity to arrange services that are better tailored to an individual's characteristics (positive) they do also require a greater degree of responsibility for managing employees and payment arrangements (positive or negative). This may adversely impact the ability of some customers to take up the Direct Payments option, particularly if they do not have a representative willing to act on their behalf.	Offer of a Merton Managed Account as part of the standard DP offer (choice)	By monitoring the take up of MMAs as a proportion of overall Direct Payment numbers	Ongoing	Existing	DP Team Manager	For 2022/23
	Ensuring arrangements are in place to effectively signpost customers to voluntary sector support organisations	Arrangements agreed with relevant organisations and published on website and in accessible formats	April 2022	Existing	DP Team Manager	For 2022/23
	Review and improve the quality and accessibility of support documentation.	Documentation reviewed, updated and published on website and in accessible formats	April 2022	Existing	DP Team Manager	For 2022/23

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome 2 Assessment

- Direct Payments have the potential to improve the outcomes for a number of cohorts of vulnerable people with protected characteristics.
- Being able to access Direct Payments in a way that is manageable for individuals is key to mitigating any potential adverse impact from increasing Direct Payment take up.
- Offering a Merton Managed Account (MMA) is the primary means of making Direct Payments a manageable option for all.
- The MMA offer can be supplemented with improved signposting to other forms of support and by making the Council's own support resources more accessible. In combination, these actions will adequately mitigate any risk of adverse impacts.

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Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	Keith Burns, Interim Assistant Director, Commissioning	Signature:KB	Date: 02.11.21
Improvement action plan signed off by Director/ Head of Service	Keith Burns, Interim Assistant Director, Commissioning	Signature:KB	Date: 02.11.21

DRAFT

Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Housekeeping savings CH106
Which Department/ Division has the responsibility for this?	Community & Housing

Stage 1: Overview	
Name and job title of lead officer	Richard Ellis, Head of Strategy & Partnerships
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	To review ancillary budget lines in the light of changed working patterns to identify opportunities to reduce budgets in areas such as printing, travel etc. All C&H budgets will be reviews. It will not look at staffing or budgets for direct provision or commissioning of services to the public
2. How does this contribute to the council's corporate priorities?	Efficiency.
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	It is largely an internal proposal but may restrict flexibility in use of budgets
4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?	It may impact marginally on corporate contracts such as printing

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

Review of ancillary budget lines against actual 2019 and 2020.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age		X		X	
Disability		X		X	
Gender Reassignment		X		X	
Marriage and Civil Partnership		X		X	
Pregnancy and Maternity		X		X	
Race		X		X	
Religion/ belief		X		X	
Sex (Gender)		X		X	
Sexual orientation		X		X	
Socio-economic status		x		X	

7. If you have identified a negative impact, how do you plan to mitigate it?

N/A

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

Outcome 1 – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**

Outcome 2 – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**

Outcome 3 – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have 'due regard' and you are advised to seek Legal Advice.**

Outcome 4 – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome [1](#) Assessment

- [No equalities impacts identified](#)

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	Richard Ellis, Head of Strategy & Partnerships	Signature: RE	Date: 20/10/21
Improvement action plan signed off by Director/ Head of Service	John Morgan, acting Director C&H	Signature: JM	Date:11/11/21

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Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Increase income collection by reviewing all Fees and Charges and extending use of space in libraries by third party providers CH107
Which Department/ Division has the responsibility for this?	Community & Housing / Library & Heritage Service

Stage 1: Overview

Name and job title of lead officer	Anthony Hopkins – Head of Library, Heritage & Adult Education Service
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	<p>To review Library & Heritage Service fees and charges following a pause in the annual reviews due to the pandemic. To seek to expand income collected from commercial hires and other uses of space.</p> <p>The proposal seeks to achieve a balanced budget for the service and will have no impact on the range of services provided by libraries. There may also be the opportunity to expand the range of services depending on the organisations who may seek to locate their services in libraries. The primary focus of the proposal is to maximise the use of existing space available for private hire and minimise impact on general library usage (e.g. fines, hire charges etc.).</p>
2. How does this contribute to the council's corporate priorities?	<p>The saving seeks to achieve a balanced budget for the service that supports overall financial resilience of the Council. The saving will also mean that all services under the Public Libraries and Museums Act 1964 will continue to be delivered.</p> <p>Key corporate priorities that libraries deliver against include:</p> <ul style="list-style-type: none"> - Supporting our most vulnerable residents of all ages; - Bridging the gap and reducing inequalities; - Creating a great place to grow up and live in; - Maintaining a clean and safe environment; - Building resilient communities; - Continuously improving.

<p>3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.</p>	<p>The proposals could benefit organisations looking for more affordable space to use in the community. The large footfall into libraries could attract new customers to services they provide. Expanding the third party use of libraries will also have a positive impact on footfall and the opportunity to deliver new collaborative services in libraries. The service is keen in particular to expand its provision around skills and employment, health and wellbeing, digital skills and will seek to increase usage from groups in these areas.</p> <p>The workforce will need to continue to develop its commercial skills and ability to market services to new organisations. Ongoing learning and development is planned around this.</p> <p>No annual fees and charges review has been conducted for the last 2 years. The proposal will review current levels of fees and charges in line with inflation and other factors. No changes are being proposed for concessions for children and young people, job seekers, disabled, elderly and for use of space for charitable organisations. The primary focus will be on the pricing of use of existing commercial spaces for hire. The wider review of fees and charge will also look at how existing charges are impacting on customer usage and seek to maximise resident usage of libraries.</p>
<p>4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?</p>	<p>The Library & Heritage Service is responsible for the delivery of this saving. It is supported in the delivery of its services by a range of corporate services including Facilities Management (maintenance of library buildings), IT Services (maintenance of the ICT estate), Human Resources, Finance and Health & Safety. The proposal will encourage more Council services to make use of libraries for external meetings.</p>

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Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

The Library & Heritage Service has considered a number of factors before putting forward this proposal. It has analysed the following information:

- Usage data of each library based on gender, ethnicity, age and locality of residents to the library. It has also used this data to compare to other libraries in the borough.
- The condition of the current buildings and their suitability to be able to be maintained, including their cost, in comparison to the rest of the estate.
- Income currently collected and comparisons to pre-pandemic levels with modelling around projections of occupancy of space by hirers if usage is increased.
- Benchmarking of hire charges against neighbouring authorities.
- The range of services provided in them and the opportunity to collaborate through other local provision.
- It has also used borough population data including the Merton hub to help inform future demand.

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Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age	✓			✓	Whilst the proposal is to maximise savings by increasing commercial lettings of existing space the service is keen to expand its provision around skills and employment, health and wellbeing and digital skills and will seek to increase usage from groups in these areas. This may lead to potential opportunities and partnerships that bring more services into libraries and could benefit all protected characteristics.

Disability	✓			✓	
Gender Reassignment	✓			✓	
Marriage and Civil Partnership	✓			✓	
Pregnancy and Maternity	✓			✓	
Race	✓			✓	
Religion/ belief	✓			✓	
Sex (Gender)	✓			✓	
Sexual orientation	✓			✓	
Socio-economic status	✓			✓	

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7. If you have identified a negative impact, how do you plan to mitigate it?

The primary focus of this proposal is to maximise the use of existing commercial space for hire in libraries.

A review of Fees & Charges will be conducted next summer across all areas. This will ascertain whether the current levels of charges are appropriate and benchmarked against neighbouring authorities. There are no proposals to review concessionary charges for the elderly, disabled, job seekers or children and young people and all existing arrangements will remain in place.

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- | | |
|-------------------------------------|---|
| <input checked="" type="checkbox"/> | Outcome 1 – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. No changes are required. |
| <input type="checkbox"/> | Outcome 2 – The EA has identified adjustments to remove negative impact or to better promote equality. Actions you propose to take to do this should be included in the Action Plan. |
| <input type="checkbox"/> | Outcome 3 – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have ‘due regard’ and you are advised to seek Legal Advice. |
| <input type="checkbox"/> | Outcome 4 – The EA shows actual or potential unlawful discrimination. Stop and rethink your proposals. |

Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome [add](#) Assessment

Please include here a summary of the key findings of your assessment.

- What are the key impacts – both negative and positive – you have identified?
- Are there any particular groups affected more than others?
- What course of action are you advising as a result of this assessment?
- If your EA is assessed as Outcome 3 and you suggest to proceeding with your proposals although a negative impact has been identified that may not be possible to fully mitigate, explain your justification with full reasoning.

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	Anthony Hopkins / Head of Library, Heritage & Adult Education Service	Signature: A Hopkins	Date: 1/11/2021
Improvement action plan signed off by Director/ Head of Service	John Morgan, acting Director C&H	Signature: JM	Date: 11/11/21

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Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Self-Funder Brokerage offer CH108
Which Department/ Division has the responsibility for this?	Community and Housing

Stage 1: Overview

Name and job title of lead officer	Keith Burns
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	<p>The Government has announced that with effect from October 2023 the Council will assume new responsibilities to provide support to individuals who privately fund their social care (self-funders). The Council will be able to charge a fee for the provision of elements of this support, including support to source providers of services and to manage the ongoing relationship with those providers.</p> <p>The Council has well established Brokerage and Direct Payment functions and our view is that the teams who provide these services will be well placed to offer a competitive and high quality service to private funders. It may also be possible to offer this service on a wider footprint than Merton.</p> <p>Our current intention is to offer a self-funder service with effect from April 2023, with this early implementation giving us an opportunity to refine the offer prior to full implementation from October 2023. Our current working assumption is that with the right offer we should be able to generate income of around £25k per annum from providing this service (assuming 250 customers at an average fee of £100 per customer).</p>
2. How does this contribute to the council's corporate priorities?	The scheme will contribute directly to meeting new statutory requirements as well as contributing to commercialisation and income generation priorities.
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	The primary group of customers affected are those who require social care support but who wish to fund this care privately. These are most likely to be older residents and/or families acting on behalf of older residents. Individuals and/or their families are also very likely to have relatively significant resources that enable them to fund private care.

4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?

The responsibility is not shared, but as noted above it may be that we are able to offer the service on a wider geographic footprint if neighbouring boroughs do not set up equivalent arrangements.

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Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

There is limited data available on the number or characteristics of self-funders. Our analysis of the likely cohort is based largely on soft intelligence from our relationships with social care providers locally.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age	✓			✓	Increased access to support for individuals who are not eligible for state funded care or otherwise choose to fund their care privately. (Positive)
Disability	✓			✓	As above
Gender Reassignment		✓		✓	N/A
Marriage and Civil Partnership		✓		✓	N/A
Pregnancy and Maternity		✓		✓	N/A
Race		✓		✓	N/A
Religion/ belief		✓		✓	N/A
Sex (Gender)		✓		✓	N/A
Sexual orientation		✓		✓	N/A
Socio-economic status		✓		✓	N/A

7. If you have identified a negative impact, how do you plan to mitigate it?

N/A

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have ‘due regard’ and you are advised to seek Legal Advice.**
- Outcome 4** – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome <u>1</u> Assessment
Assessment demonstrates no identified negative impacts.

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	Keith Burns, Interim Assistant Director, Commissioning	Signature: KB	Date: 03.11.21
Improvement action plan signed off by Director/ Head of Service	Keith Burns, Interim Assistant Director, Commissioning	Signature: KB	Date: 03.11.21

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Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Placements CH109
Which Department/ Division has the responsibility for this?	Community & Housing

Stage 1: Overview	
Name and job title of lead officer	Phi Howell, interim AS ASC
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	To take part of the ongoing underspend in ASC placements budgets as saving. This is a continuation of previous savings based on a move to strengths-based assessments and ensuring value for money in the selection of care options.
2. How does this contribute to the council's corporate priorities?	Efficiency.
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	Service users who may be offered different options including referral to mainstream and voluntary services as well as directly provided and commissioned services.
4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?	No

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

Detailed monthly monitoring of placements activity

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies Positive impact		Tick which applies Potential negative impact		Reason Briefly explain what positive or negative impact has been identified
	Yes	No	Yes	No	
Age		X	X		Service users may be offered different options to those that they expect
Disability		X	X		
Gender Reassignment		X		X	
Marriage and Civil Partnership		X		X	
Pregnancy and Maternity		X		X	
Race		X		X	
Religion/ belief		X		X	
Sex (Gender)		X		X	
Sexual orientation		X		X	
Socio-economic status		X	x		

7. If you have identified a negative impact, how do you plan to mitigate it?

Every support plan is based on an individual assessment of need which is scrutinized by the Outcomes Forum to ensure consistency and fairness. Support plans are subject to annual review.

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have ‘due regard’ and you are advised to seek Legal Advice.**
- Outcome 4** – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources ?	Lead Officer	Action added to divisional/ team plan?
Reduced choice of options	Scrutiny by Outcomes Forum		Ongoing	Exisitng	PH	No

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome [2](#) Assessment

[There is a low to moderate potential impact through different options being presented,](#)

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	Phil Howell, Acting AD ASC	Signature: PH	Date: 05/11/21
Improvement action plan signed off by Director/ Head of Service	John Morgan, acting Director C&H	Signature: JM	Date: 11/11/21

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Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Commissioning efficiencies CH110
Which Department/ Division has the responsibility for this?	Community and Housing

Stage 1: Overview

Name and job title of lead officer	Keith Burns
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	<p>The Council has a long standing relationship with the SWL and St Georges Mental Health Trust to provide supported living support to a group of eight individuals with mental health difficulties at a single property.</p> <p>The Trust have informed the Council that they no longer wish to provide the supported living service and as a result we plan to tender for a new support provider. There are three current employees on NHS terms and conditions who will have transfer rights under the TUPE regulations. The Trust currently cover the remaining staffing requirements via bank or agency staffing.</p> <p>Our expectation is that the recommissioning of the service will generate around £50k of savings for 2022/23 and recurring as there are a number of costs built into the current NHS arrangement that will not be carried over to a new provider.</p> <p>The service will be recommissioned on a like for like basis in terms of levels of support provided and there will be no detriment to the existing cohort of eight individuals as a result.</p>
2. How does this contribute to the council's corporate priorities?	The supported living scheme contributes to the meeting of our statutory duties under the Care Act and Mental Health acts. Delivering better value through procurement activity is a key aim of the Council's Procurement Strategy.
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	The supported living scheme supports eight individuals with long term mental health difficulties, including two who are in their 70's.

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4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?

The responsibility is not shared, although the Trust may have some ongoing role in providing care and treatment to the eight individuals separately from the supported living service.

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Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

The needs of the eight individuals have been reviewed by the Mental Health Teams. No concerns about a change of support provider have been identified.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age		✓		✓	N/A
Disability		✓		✓	N/A
Gender Reassignment		✓		✓	N/A
Marriage and Civil Partnership		✓		✓	N/A
Pregnancy and Maternity		✓		✓	N/A
Race		✓		✓	N/A
Religion/ belief		✓		✓	N/A
Sex (Gender)		✓		✓	N/A
Sexual orientation		✓		✓	N/A
Socio-economic status		✓		✓	N/A

7. If you have identified a negative impact, how do you plan to mitigate it?

N/A

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have 'due regard' and you are advised to seek Legal Advice.**
- Outcome 4** – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome 1 Assessment

Assessment demonstrates no identified negative impacts.

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	Keith Burns, Interim Assistant Director, Commissioning	Signature: KB	Date: 03.11.21
Improvement action plan signed off by Director/ Head of Service	Keith Burns, Interim Assistant Director, Commissioning	Signature: KB	Date: 03.11.21

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Equality Analysis



Please refer to the guidance for carrying out Equality Analysis (available on the intranet).
Text in blue is intended to provide guidance – you can delete this from your final version.

What are the proposals being assessed?	Commissioning CH111
Which Department/ Division has the responsibility for this?	Community and Housing

Stage 1: Overview	
Name and job title of lead officer	Keith Burns
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	There are a range of specialist commissioning posts across the Community and Housing Department as well as a number of individuals whose role incorporates some commissioning responsibilities. During 2022/23 we will undertake a review of our commissioning capacity across the Department with a view to ensuring that we are able to operate as efficiently as possible. We believe that this will provide an opportunity to consolidate resources and to generate a saving of in the region of £65k per annum from 2023/24 as a result.
2. How does this contribute to the Council's corporate priorities?	The proposed saving will contribute to the overall achievement of the Council's medium term financial targets.
3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.	The employees in scope will be determined early in 2022/23. There may be an opportunity to hold vacant posts to minimise risk for existing employees.
4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?	The responsibility is not shared.

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

The in scope employees will be identified in early 2022/23 and a further iteration of this EIA will be completed at that time.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

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Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age		✓	✓		Until such time as the employees in scope are identified there is a small risk that there may be a negative impact.
Disability		✓	✓		As above
Gender Reassignment		✓	✓		As above
Marriage and Civil Partnership		✓	✓		As above
Pregnancy and Maternity		✓	✓		As Above
Race		✓	✓		As above
Religion/ belief		✓	✓		As above
Sex (Gender)		✓	✓		As above
Sexual orientation		✓	✓		As above
Socio-economic status		✓	✓		As above

7. If you have identified a negative impact, how do you plan to mitigate it?

The EIA will be updated at the point when in scope employees are identified (early 2022/23) and any necessary mitigation will be put in place at that time.

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed. **No changes are required.**
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality. **Actions you propose to take to do this should be included in the Action Plan.**
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully. **If you propose to continue with proposals you must include the justification for this in Section 10 below, and include actions you propose to take to remove negative impact or to better promote equality in the Action Plan. You must ensure that your proposed action is in line with the PSED to have ‘due regard’ and you are advised to seek Legal Advice.**
- Outcome 4** – The EA shows actual or potential unlawful discrimination. **Stop and rethink your proposals.**

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Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?
Until such time as the employees in scope are identified there is a small risk that there may be a negative impact.	Mitigation actions will be devised once in scope employees are identified. In any case, the Managing Workforce Change policy will be followed and staff supported appropriately.	TBC	TBC	TBC	Keith Burns	For 2022/23

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Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome 2 Assessment

Assessment demonstrates some risk of negative impacts, but will need to be reviewed in early 2022/23 once in scope staff are identified.

Stage 7: Sign off by Director/ Head of Service			
Assessment completed by	Keith Burns, Interim Assistant Director, Commissioning	Signature: KB	Date: 03.11.21
Improvement action plan signed off by Director/ Head of Service	Keith Burns, Interim Assistant Director, Commissioning	Signature: KB	Date: 03.11.21

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Service Planning

2022-23 Draft Service Plans

Our draft Service Plans and Commissioning Plans are set out in the following pages. As well as Service Plans we have three Commissioning Plans for our commissioned services delivered by third parties:

- Merton Adult Education
- Parks and Green Spaces
- Waste Management and Cleansing

Service Plans and Commissioning Plans were developed by service departments during the 2022/26 Business Planning process. The attached draft Service Plans and Commissioning Plans will be considered by Cabinet on 17 January 2022 and by the Overview and Scrutiny Commission and Panels during the January cycle of meetings. They will then be considered for approval by Council on 2 March 2022.

The Service Plans have five sections:

1. Overview – setting out the key outcomes for the service, links to the Council's ambition and contextual information.
2. Where we are now – a summary of progress from the previous year.
3. Delivery plan – objectives, activities and performance measures
4. People, Technology and Improvement – a summary of each
5. Financial summary – budgets and forecasts

We have undertaken a 'light-touch' refresh of service plans this year as we are developing a new approach to service planning to align with the a new corporate ambition for Merton. This ambition will set out a clear set of priorities for the Council and all our planning will be aligned to achieving this ambition.

Index of Departmental Service and Commissioning Plans

Children, Schools and Families	Community and Housing	Corporate Services	Environment and Regeneration
Children's Social Care and Youth Inclusion	Adult Social Care – Commissioning and Market Development	Corporate Governance	Development & Building Control
Education	Adult Social Care – Direct Provision	Customers, Policy and Improvement	Future Merton
	Adult Social Care – Learning Disabilities	Human Resources	Leisure & Cultural Development
	Adult Social Care - Operations	Infrastructure & Transactions	Parking
	Housing Needs & Enabling	Resources	Parks & Green Spaces*
	Library and Heritage Service	Revenues & Benefits	Property
	Merton Adult Education*		Regulatory Services Partnership
	Public Health		Safer Merton
			Transport
			Waste Management and Cleansing *

Children, Schools & Families

Service Plan for: Children's Social Care and Youth Inclusion

Service Manager: *Dheeraj Chibber, Asst Director (Children's Social Care & Youth Inclusion)* Cabinet Member: *Cllr Eleanor Stringer*

Overview of the service

Children's Social Care and Youth Inclusion (CSC & YI) Division delivers a range of legal and statutory functions to children in need, children at risk of harm, children in care, care experienced young adults and children under the supervision of youth justice services (YJS). The Division is registered with Ofsted as a Fostering Agency and an Adoption Agency.

CSC works with children who meet the threshold for statutory social work assessments and interventions. Over the 2020/21 financial year, the authority received over 6,000 contacts. 2,035 of these contacts resulted in referrals to children's social care. At the 31st March 2019, 142 children were looked after and 186 children were subject to a Child Protection plan. There were 166 young adults who met the care experienced young adult eligibility criteria (as at 31 March 2021). There were 33 first-time entrants to the YJS. The Fostering Service recruits, assesses and supports Merton foster carers. The Adoption Agency works in partnership with Adopt London South to secure forever families for children who are unable to safely remain in the care of their birth family. The Access To Resources Team oversees placements and commissioning for children in our care and care experienced young adults. Our strategies and annual sufficiency statements drive placement and commissioning decisions and the recruitment of in-house foster carers.

The Division collaborates strategically and operationally with services and partners in the regional and local children's network (and in particular the council-run Family Wellbeing Service). These interfaces contribute to the effectiveness of the safeguarding and Early Help arrangements for Merton children and families as part of a holistic service offer.

Merton has lower rates of children in care than the majority of London Boroughs, as well as lower rates of first-time entrants to the criminal justice system. CSC & YI work alongside Merton families to enable them to safely care for their own children and we continuously challenge ourselves to find new ways of ensuring that our responses prioritise intervention at the lowest appropriate level. This approach allows us to promote the strengths and resilience of Merton families and communities in safely caring for their children, minimising the use of costly statutory interventions.

Our Youth Inclusion Service provides a range of targeted services to support vulnerable young people and their families. We work with young people who require statutory intervention to address their offending, those who are at risk of exploitation and contextual harms as well as those children who have left care.

Merton's ambitions

- Support our most vulnerable residents of all ages
- Maintain a clean and safe environment
- Create a great place to grow up and live in
- Build resilient communities
- Bridge the gap and reduce inequalities
- Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
Merton children, young people, families and carers use the services delivered by CSC & YI.	It is not yet clear what the medium to long-term impact of the coronavirus pandemic will be on children and families in Merton.	Since the pandemic, we have been responding to continuous changes to government guidance in relation to ensuring the safety of our teams	

<p>We actively seek feedback from children and families about their experiences. We use learning from feedback and complaints to improve our practices and services through our Learning & Improvement Board.</p>	<p>The number of children being referred to CSC & YI has remained consistent with previous years however 2020/21 has seen a rise in the total number of children being supported by CSC & YI and the complexity of their needs. This is evidenced by a 22% increase in child in need plans; a 32% rise child protection investigations and a doubling in the number children with a child protection plan between 2020 and 2021.</p>	<p>as well as the children and families with whom we work.</p>	<p>In November 2021, we refreshed our self-evaluation. The SEF is underpinned by an action plan containing key actions to focus our improvement activities effectively. We furthermore adjusted practices during the Covid pandemic to ensure the most vulnerable children and those with social workers could continue to access education.</p>
<p>We encourage our children in care and our care experienced young adults to express their views and contribute to service improvements through Children in Care Council activities and attendance at the Corporate Parenting Board.</p>	<p>We know that children and their families have not been able to access the support and resources of their wider families and communities during the pandemic restrictions. For some families this has negatively impacted on their mental wellbeing, parenting and family relationships.</p>	<p>The government is also considering changes to the responses to unaccompanied asylum seeking children with specific changes to the way in which children entering the UK are dispersed.</p>	<p>An Ofsted assurance visit in September 2020 confirmed that 'the most vulnerable children and families in Merton have benefited from a high level of protection and support throughout, and despite, the Covid-19 emergency'. Furthermore, 'children and young people in Merton's care have continued to make good progress and have been protected'. Ofsted provided further positive feedback during an annual meeting in November 2021.</p>
<p>The introduction of tri-annual practice weeks and a monthly audit cycle, as part of our quality assurance framework captures regular feedback from children and families about how they experience their interventions.</p>		<p>At regional level, the Metropolitan Police is in the process of updating a number of multi-agency protocols and agreements. In some instances, there has been limited consideration to existing processes.</p>	<p>We continue to focus our improvement activities on a small number of key areas in anticipation of a full inspection once the inspection regime re-starts.</p>
		<p>The CCG has also aligned and re-configured services. During the Covid pandemic, we have experienced the re-deployment of health visiting resources. This has had an impact on visiting Merton children and their families.</p>	

Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
<p>Early Help and Family Wellbeing Service</p> <ul style="list-style-type: none"> - implementation and mobilisation of new Family wellbeing service - review of allied teams and services with CSC& YI and the Education Division to support improved ways of working. 	<p>Re-structure in support of the Early Help reforms has been completed, and new structures went live in September 2021.</p> <p>Following the re-structure, teams are now in place to support the new, integrated approach to Early Help.</p> <p>CSF has put in place structures to monitor the effectiveness of these new arrangements.</p>	Close
Contextual Safeguarding	<p>As part of our ongoing 'contextual harm project' (in partnership with the University of Bedfordshire) we have improved safety planning processes which sit alongside statutory safeguarding processes. This will strengthen practice and enhance the young person's voice as part of the planned intervention. We have strengthened practice oversight by introducing a specialist 'Independent Reviewing Officer' (IRO) post with a focus on ensuring plans address extra-familial harm.</p> <p>We have strengthened our operational processes by replacing the Multi-Agency Risk and Vulnerability Panel (MARVE) processes with a 'Missing and Child Exploitation' (MACE) panel. This brings us in line with pan-London procedures, adopting the same approach and process as our neighbouring Local Authorities and ensures a more agile approach to addressing children and young people at the highest risk of extra-familial harm. It also enables us to address all forms of exploitation in one forum, reporting on themes, trends and locations to strengthen future planning and interventions with key partners.</p> <p>Strategically, the MSCP 'Promote and Protect Young People' sub-group has strengthened its overview processes and now receives</p>	

	<p>Strategically, the MSCP 'Promote and Protect Young People' sub-group has strengthened its overview processes and now receives regular quantitative and qualitative information. During 2021, the PPYP launched the multi-agency Contextual Safeguarding Strategy and Action Plan which outlines the current actions we are taking to expand our response to safeguard young people from risks outside of their family home.</p>	
Supporting Technology and Infrastructure	<p>Having commissioned a diagnostic report into the existing case management system (Mosaic), CSF successfully secured corporate investment to make the necessary repairs. The delivery of a programme of work is taking place as planned, and we are currently predicting to deliver this work within budget and timescale. We have put in place revised and stronger cross-directorate governance and oversight arrangements.</p>	Carry forward
<p>CSC&YJ Workforce</p> <ul style="list-style-type: none"> - review existing structures to better align delivery to need and priorities - recruitment and retention strategy - development of Practice Model 	<p>The re-structure has been delivered and the new service structure went live in September 2021.</p> <p>Recruitment and Retention: There has been an updated recruitment and retention strategy policy and approach. This includes efforts to improve our external branding and advertising via the web. Frontline and Academy approach support the development of in-house social workers.</p> <p>Practice Model: Learning from quality assurance and auditing processes have informed future amendments to the existing practice model. We are in the process of promoting this with our staff and partners underpinned a commitment to relationship-based practice and associated tools.</p>	Carry forward

<p>Innovation work streams</p> <ul style="list-style-type: none"> - Mockingbird Programme - Family Networking - Emotional wellbeing in children in care service -improve semi-independent accommodation offer - Frontline training programme - Social Workers in Schools Project 	<p>Mockingbird Programme: launched earlier this year. One constellation now in place consisting 8 forster homes supported by a Hub Home Carer.</p> <p>Family Networking: staff training completed. practice guidance drafted. Processes have been amended and now fully operational across Children and Families Hub and Assessment Teams.</p> <p>Semi-independent accommodation offer: Following completion of a needs assessment we are now exploring better and more efficient ways of commissioning. This may include establishing a framework for accommodation and support, including repurposing Merton assets for in-house provision.</p> <p>Frontline Training Programme: We continue to deliver Frontline training opportunities.</p> <p>Social Workers in Schools Project: We secured DfE funding in the summer of 2020 for Social Workers in Schools pilot. We were able to fund 6 social workers attached to 6 secondary schools with a view to identify emerging problems early. We are exploring the sustainability of this work when central funding comes to an end in the summer of 2022.</p> <p>?</p>	Carry forward
<p>Early Help (Front Door/Thresholds)</p> <ul style="list-style-type: none"> - review current wellbeing model (thresholds document) - put in place integrated responses based on shared understanding of risk and need 	<p>A Task and Finish Group comprising of multi-agency professionals developed the refreshed threshold document which has been approved by the MSCP and has been published.</p> <p>Developed a combined 'request for services' to provide a single pathway for residents and professionals.</p>	Close

<p>Supported living for care experienced young people - review commissioning approach</p>	<p>Initial proposals developed with input from across the council and from housing providers. These have been considered at Corporate Parenting Board. Detailed business case being compiled based on this scoping work. Shared Lives project is being extended to care experienced young people on the edge of adult services. Consultation period with young people scheduled early 2020.</p>	<p>CLOSE and remove (not captured in the innovation workstream)</p>
<p>NEW ACTIONS: CONTEXTUAL SAFEGUARDING</p> <p>- improving processes to gather feedback from children and young people - embed new practice approaches including peer assessments, locality assessments, the CSE Assessment Tool and Missing Tools</p>	<p>In 2022/23, our focus will remain on strengthening operational and strategic responses to Contextual Harm.</p>	<p>Carry forward</p>

How will we get there?									
Service Objective 1			Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
<i>Embed the council's approach to Early Help and the interfaces with the Family Wellbeing Service</i>			Support our most vulnerable residents of all ages						
			Bridge the gap and reduce inequalities						
			Create a great place to grow up and live in						
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of contacts to the front door	<i>Not reported corporately</i>		n/a	n/a	n/a	n/a	n/a	Quarterly	Low
% of contacts into referrals to children's social care	<i>Not reported corporately</i>		n/a	n/a	n/a	n/a	n/a	Quarterly	High
Number of CIN Plans	<i>Not reported corporately</i>		n/a	n/a	n/a	n/a	n/a	Monthly	Low
Number of two-year olds who are accessing two-year old funding per term	<i>Not reported corporately</i>							Annually	High
% of total 0-5 year population from areas of deprivation (IDACI 30%) whose families have accessed children's centre services	43.40%	Red	55-65%	55-65%				Quarterly	Within Range
% of single assessments completed within 45 days	95.17%	Red	100%	100%				Quarterly	High
% children who become subject of Child Protection Plan for a second or subsequent time	19%	Green	12-20%	12-20%				Quarterly	Within Range
Project / activity name	Description						Proposed start date		Proposed end date
<i>Multi-agency approach to Early Help</i>	Following the agreement of thresholds, work with partners to embed our approach to Family Support in Merton as outlined in the 'Effective Support' document which includes roll-out of multi-agency training on the new approach to EH in Merton in line with I thrive						Apr-22		Mar-23
<i>Embedding combined front door</i>	Embedding the processes to enable children, families and professionals to access help, advice and services which meet children's identified needs at the right time.						Jan-22		Jan-23
<i>Effective interface between statutory and Early Help services</i>	Further develop and embed robust step-up and step-down processes particularly from Family Support a						Apr-22		Mar-23
Potential barriers to achieving objective									
Description of barrier					Mitigating Actions				
<i>Capacity of the wider partnership to provide effective early help interventions particularly whilst managing a pandemic.</i>					<i>Effective application of thresholds and clarity of remit of FWB. Work with partners to strengthen universal and Early Help services in the borough.</i>				

Processes for step-up and step-down of services in response to the changing needs of children and their families particularly whilst managing a pandemic.					Clear thresholds articulated in the Effective Support Practitioner Guidance and step-up and step-down processes being developed across services.				
Impact on the customer/end user									
Focus on three key outcomes: - better outcomes for all children - reduction in statutory interventions - receiving the right service, at the right time and the right place									
Partners / interdependencies									
Key link to Education and Early Help Division who run the Family Wellbeing Service Via the Merton Safeguarding Partnership Board, link with statutory partners (Police, Health) as well as non-statutory agencies (Education, vol sector).									
Service Objective 2					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				
Embed Contextual Safeguarding approaches across the CSC & YI system and structures.					Support our most vulnerable residents of all ages				
					Create a great place to grow up and live in				
					Build resilient communities				
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of children known to the authority who are at risk of Child Sexual Exploitation, Child Criminal Exploitation or Serious Youth Violence	Not reported corporately		n/a	n/a	n/a	n/a	n/a	Monthly	Low
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date		Proposed end date
Further embed contextual harm strategy and tool kit.	Work with partners to further develop safeguarding responses to contextual harm.						Apr-22		Mar-23
Further embed the changes made to panels for contextual harm.	Work with the service and with partners to further ensure clear partnership oversight through the MAC						Jan-22		Sep-22
Scale-up programme	Further develop and implement improved contextual safeguarding practice						Jan-22		Sep-22
Potential barriers to achieving objective									
Description of barrier					Mitigating Actions				
Partnership understanding and adopting contextual harm tools consistently - e.g. Young Person's voice.					Effective consultation and advice alongside training and champions supporting change across CSC & YI				

Impact on the customer/end user										
<i>Improved safeguarding for adolescents at risk of contextual harm.</i>										
Partners / interdependencies										
<i>This is a multi-agency strategy. Input from Police, Education, health partners and voluntary organisations.</i>										
Service Objective 3					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
<i>To have in place effective IT infrastructure that supports the delivery of social work practice and youth justice interventions.</i>					Continuously improve					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
n/a										
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Oversee a programme of restorative work to repair existing Case Management System (Mosaic)</i>	Based on findings from diagnostic work, implement key projects to repair Mosaic.						Nov-20		Nov-22	
<i>Introduce and embed Early Help workflows in support of the introduction of the combined front door.</i>	Case recording on Mosaic needs to be enabled to ensure Early Help work is captured and overseen.						Mar-21		Apr-22	
<i>Effective statutory and performance data reporting</i>	Ongoing improvements to the effectiveness and ability to report data by identifying software solutions.						Jan-22		Sep-22	
Potential barriers to achieving objective										
Description of barrier					Mitigating Actions					
<i>Not completing the work in time</i>					<i>Close oversight and prioritisation via Mosaic Change Board</i>					
<i>Lack of ongoing development resource to make Mosaic improvements beyond repair work</i>					<i>Raised on directorate risk register and being managed via Mosaic Change Board</i>					
<i>Absence of reporting tools impact on ability to use data effectively</i>					<i>Explore options for piloting and investing in service's existing IT infrastructure.</i>					
Impact on the customer/end user										
<i>Better user environment for social workers.</i>										
<i>Improved ability to oversee and scrutinise practice</i>										
Partners / interdependencies										
<i>Input from across the directorate is required.</i>										

Service Objective 4				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the						
<i>Supporting our workforce to deliver effective interventions to children and their families</i>				Support our most vulnerable residents of all ages						
				Create a great place to grow up and live in						
				Continuously improve						
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
Number of vacancies	<i>Not reported corporately</i>		n/a	n/a	n/a	n/a	n/a	Annually	Low	
Average Caseloads	<i>Not reported corporately</i>		n/a	n/a	n/a	n/a	n/a	Annually	Low	
Proportion of agency staff	<i>Not reported corporately</i>		n/a	n/a	n/a	n/a	n/a	Annually	Low	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Recruitment and Retention</i>	Reviewing the recruitment and retention plan and launching strategy to better recruit and retain staff. Ensuring ongoing CPD.						<i>Apr-22</i>		<i>Mar-23</i>	
<i>Launch revised practice model</i>	The practice model is being revised and simplified to support relationship-based practice and the consistent understanding, application and training of the model across the Service.						<i>Sep-21</i>		<i>Sep-22</i>	
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
<i>Market availability of qualified experienced social workers to recruit to existing and forecasted vacancies.</i>					<i>Recruitment and retention plan being further developed to ensure we are broadening our offer and re</i>					
<i>Increased social worker caseloads will deter permanent recruitment and the number of agency social workers seeking transfer to permanent posts.</i>					<i>Recruitment and retention plan being further developed to ensure we are broadening our offer and re</i>					
<i>Retention of staff will depend upon the training, development and career progression opportunities being available.</i>					<i>Furthering our offer via CPD and Apprenticeship opportunities as part of the revised recruitment and re</i>					
Impact on the customer/end user										
<i>Children and Families experience reduced number of change of social worker</i>										
<i>Service is more cost-effective due to less reliance on agency staff.</i>										
<i>increased workforce stability provides more effective interventions with children and families</i>										
Partners / interdependencies										

Service Objective 5		Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions								
<i>Deliver service innovations to improve service delivery</i>		Continuously improve								
		Create a great place to grow up and live in								
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
% foster children living in in-house provision.	48%	Red	60%	60%	60%	60%	60%	Quarterly	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Mockingbird</i>	Further roll out of and embedding of the Mockingbird model to support foster care recruitment.						Jan-22		Mar-23	
<i>Social Workers in Schools</i>	The SWIS pilot is continuing till March 2022 with a view to extending this. Evaluation options being considered with the What Works centre.						Apr-22		Mar-23	
Potential barriers to achieving objective										
Description of barrier					Mitigating Actions					
Future DFE funding with regards to SW in Schools					Work with partners (schools), DfE and What Works centre and explore ways of making this service financially sustainable					
Market availability of foster carers particularly following the pandemic.					Continued focus on recruitment through innovative solutions such as Mockingbird programme, closely					
Impact on the customer/end user										
The SWIS project identifies vulnerable teenagers early where there may be concerns / needs and therefore by seeing the young people at school, the SW is viewed as a supportive member of the school staff team, increasing confidence in the role of the SW and increases the potential to alleviate problems before they escalate to statutory involvement. Mockingbird will ensure improved stability and support for care experienced children and young people thereby improving longer term outcomes and the care they experience from their corporate parents.										
Partners / interdependencies										
Service Objective 6		Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions								
<i>Increase the availability of good quality and cost-effective accommodation for children in care and care experienced adults for whom LB Merton has statutory duties</i>		Bridge the gap and reduce inequalities								
		Statutory requirement								
Performance Measures										

Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% of care leavers in suitable accommodation	79%	Red	95%	95%	95%	95%	95%	Monthly	High
Percentage of children in our care who are placed more than 20 miles away	18%	Green	Better than London average	Better than London average	Better than London average	Better than London average	Better than London average	Quarterly	Benchmark
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	
<i>Diagnostic work</i>	A review of existing properties and their potential for use as accommodation options for our children in care and care leavers. This includes council-owned properties such as care takers lodgings.					<i>Apr-22</i>		<i>Mar-23</i>	
<i>Commissioning Strategy</i>	Further explore new commissioning processes and frameworks with a view to broaden pool of accommodation providers.					<i>Apr-22</i>		<i>Mar-23</i>	
<i>Shared Lives</i>	Expansion of existing shared lives project to include children with care experience.					<i>Apr-21</i>		<i>Mar-22</i>	
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
<i>Corporate ownership to develop robust cost-benefit analysis.</i>					<i>Ensure corporate buy-in through existing corporate structures - including making the case as part of Merton's Covid recovery work.</i>				
<i>Local housing strategies and sufficiency does not focus on the housing needs of children in our care and those with care experience.</i>					<i>Ensure the housing needs of children in our care are captured and reported on.</i>				
Impact on the customer/end user									
<i>Children in our Care and adults with experience of care access high quality accommodation in the borough</i>									
Partners / interdependencies									
<i>Housing and Housing providers</i>									
<i>Corporate Parenting Board</i>									

People

- CSC&YI has delivered a re-structure. This will enable the delivery of effective social work services within allocated funding envelopes.
- Training budgets for children social care are devolved and will remain so. As part of training innovation, CSC&YI has launched a 'Social Work Academy'. CSF is in the process of developing a workforce strategy to underpin these innovations.
- Remote working is likely to continue beyond the end of the pandemic, with workers utilising the flexibility that working from home brings. Training about the use of various communication platforms will be required.
- Access to personal protecting equipment is likely to continue so that social workers are enabled to carry out their duties safely.

Technology

Following a diagnostic report into the existing Mosaic system, a programme of extensive repair work has been launched. This is likely to remain the main focus of this division until autumn 2022.

As a division, we want to learn and retain from the way in which we have utilised technology during lock-down. Where safe and commensurate with the child/families wishes, we have developed our practice around new virtual communication platforms. We have used technology to assist with visits (rather than conducting these face-to-face). We will continue to use a variety of communication platforms to speak to each other and our service users. This will require ongoing investment and training.

This will require continued support and effective joint working with the IT team and external service providers.

Service improvement

Our existing Improvement Plan will be updated to reflect the recent findings from the Ofsted visit.

We continue to prepare for the full ILACS inspection and Youth Justice Inspection and have in place governance and processes to do so

One area we are focusing our attention on is improving professional Children's Social advice in support of the EHCP assessment process.

Financial Summary

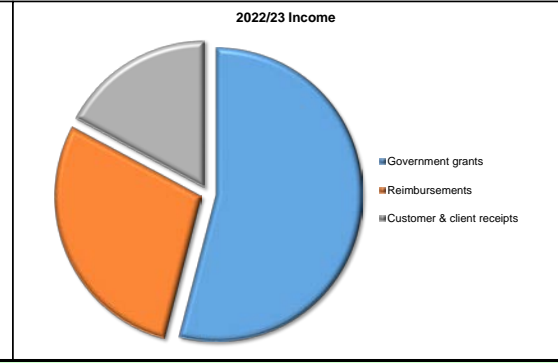
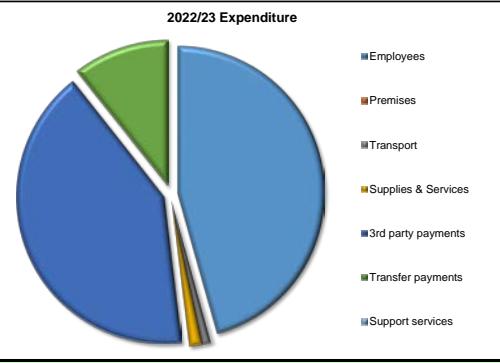
Key uncertainties moving forward within Children's Social Care will be the continued uncertain impact of the Covid19 outbreak and the need to increase contributions towards the Dedicated Schools Grant as part of the Safety Valve work to deal with the DSG deficit.

DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	23,278	23,869	23,106	-14	24,258	24,500	24,742	24,984
Employees	9,787	10,185	10,082	(1,215)	11,069	11,071	11,072	11,073
Premises	14	2	32	1,722	33	34	35	35
Transport	204	206	207	(133)	212	217	222	227
Supplies & Services	573	496	530	(195)	350	358	367	375
3rd party payments	10,293	10,140	9,681	(193)	10,019	10,245	10,472	10,698
Transfer payments	0	0	0	0	2,575	2,575	2,575	2,575
Support services	2,387	2,810	2,575	0	0	0	0	0
Depreciation	20	20	0	0	0	0	0	0

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P6	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	731	1,038	704	179	704	704	704	704
Government grants	381	538	381	198	381	381	381	381
Reimbursements	230	218	203	60	203	203	203	203
Customer & client receipts	121	282	121	(79)	121	121	121	121
Reserves	0	0	0	0	0	0	0	0
Capital Funded	0	0	0	0	0	0	0	0
Council Funded Net Budget	22,546	22,830	22,402	(193)	23,554	23,796	24,038	24,280

Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
	0	0	0	0	0	0	0	0



Summary of major budget etc. changes

2022/23

Savings
 £20k National minimum rate for Fostering/Adoption/Guardianship
 £40k Increased use of in-house fostering
 Growth - £160k UASC Placements and formally UASC that are now care placements.

2023/24

Growth - £160k UASC Placements and formally UASC that are now care placements.
 Saving - £340k CSC Placements - demand management and commissioning.

2024/25

2025/26

2025/26

2025/26

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2025/26

Service Plan for: Education

Service Manager: Elizabeth Fitzpatrick (Asst Director - Education & Early Help) Cabinet Member: Cllr Eleanor Stringer

Overview of the service

Merton School Improvement (MSI)

- monitor, analyse, evaluate and improve pupil & school performance
- develop skills of school staff in planning, teaching, assessment, leadership & management
- work with schools to reduce inequality & improve achievement for vulnerable groups
- strengthen partnership working and school to school support
- ensure best educational outcomes for children in care, and children with a social worker
- strengthen safeguarding practice in schools

Special Education Needs & Disabilities Integrated Service (SENDIS)

- build early help capacity in schools & settings, families and the community
- focus on safeguarding, early intervention & prevention as well as direct support for families
- implement the requirements of the Children and Families Act ensuring that families are central
- specialist provision for pupils with SEND

Early Years, Family Wellbeing and Early Help

- Ensure the supply of good funded quality early education provision for children aged 2, 3 and 4 in accordance with statutory duties
- Work with the early years sector to improve quality, reduce inequality and improve outcomes for vulnerable children and their families
- Deliver the borough's network of Children's Centres for families with children under the age of 5, with a focus on early childhood development and parental attachment for babies and under 3s.
- Deliver early years and childcare services to families including a high volume of places for vulnerable 2 year olds
- Deliver targeted and specialist services for children with SEND and emerging additional needs including Portage Service, Inclusion Service, Shortbreaks and Specialist Out of School provision
- Deliver the Family Information, Young People and Local Offer statutory information functions via a range of channels
- Deliver early help and targeted services through a variety of ways including one to one/case work, evidence based parenting groups, evidenced based early learning groups and Information, Advice and guidance work for vulnerable families with the aim of preventing needs from escalating
- Lead on the councils partnership across the Early help system for CSF
- Distribute over £16m of early years funding to the sector, in accordance with statutory duties

Education Inclusion

- provide universal & targeted in-house and commissioned services for YP & schools
- provide support to prevent bullying, substance misuse & teenage pregnancy, to improve attendance
- develop alternative education offerings to enable young people to stay in education, training or employment (My Futures Service)
- lead on the council's partnership with the police & CAMHS for education
- improve attendance and reduce the use of exclusion in Merton schools
- ensure participation of young people in local democracy and service design

Contracts and School Organisation

- pupil place planning & schools admissions
- school expansion & capital programme management
- contract management - including SEN Transport commissioning and PFI

Performance, Policy and Partnerships

- co-ordinate and support the directorate's service improvement activities
- produce performance data and analytical insight to the Directorate
- responsible for the submission of statutory data returns
- business support function for the statutory Merton Safeguarding Children Partnership
- co-ordinate and monitor agreed multi-agency strategies with particular responsibilities for the Children's Trust Board and SEND Reform Implementation Board.
- oversee corporate business planning and risk management functions on behalf of the directorate

Merton's ambitions

Support our most vulnerable residents of all ages
 Maintain a clean and safe environment
 Create a great place to grow up and live in
 Build resilient communities
 Bridge the gap and reduce inequalities
 Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p><i>The annual school standards report provides an overview of educational outcomes broken down by ethnicity and other protected characteristics. It shows any gaps and inequalities and is scrutinised by the Children's Scrutiny Panel. This report furthermore informs services and actions taken by schools and is discussed in the Attain forum as well as other schools fora.</i></p> <p><i>In response to the Black Lives Matter movement, the School Improvement Team have focussed on equalities issues in relation to</i></p>	<p><i>Having experienced an increase over the last decade, we are predicting that Merton's school-age population will remain stable at 14,500 and 19,000 respectively.</i></p> <p><i>The population growth over the last decade is still noticeable in the number of secondary aged populations which we predict will increase from currently 17,000 to around 19,500 by 2024/25.</i></p> <p><i>One of the biggest demand pressures has been the increase in children with EHCPs. We predict this increase to continue from currently 2200</i></p>	<p><i>During the pandemic, we have witnessed changes to school opening. Schools have had to respond to regular changes to Government guidance as new evidence about the virus emerges.</i></p> <p><i>Ofsted's school inspection framework has been paused for the duration of the pandemic. However, some schools have been visited under the section 8 framework. Schools have faced additional health and safety checks during the pandemic.</i></p>	<p><i>In line with the majority of services delivered by the council, the Education Division works almost exclusively remotely. This is likely to continue during the recovery from the Covid pandemic.</i></p> <p><i>One of the key areas of focus for the Division will be the use of analytics to inform service design and delivery. We are already using insights to drive activity to address disproportionality in educational outcomes.</i></p> <p><i>95% of our schools are rated good or</i></p>

<p>have focussed on equality issues in relation to pupil outcomes by ethnicity. In autumn, Head Teachers discussed data from the previous 3 years and are now considering actions to take in response to identified inequalities.</p> <p>The service receives regular feedback via surveys by customers. The SENDIS services hears directly from parents, and also receives feedback via an established parent forum.</p> <p>Our Early Years service receives regular feedback and conducts surveys.</p> <p>The Education Division hosts the Participation Team on behalf of the wider Directorate. The Participation Team has been working on a revised Participation Strategy to replace the existing User Voice Framework.</p>	<p>This increase is continue from currently 2200 plans to approx. 2600 by 2024/25. The increase in the number of EHCSs means that we need to consider the existing provision of special school places.</p> <p>Since September 2020, Merton has also witnessed an increase in the number of children who are elected home educated. This is in line with national trends, and we continue to monitor this with interest.</p>	<p>During the pandemic, Ofsted introduced a regime of assurance visits. This focussed on the interface between children's social care and education teams - with a particular focus on vulnerable learners.</p> <p>School exams were suspended in the academic year 19/20 and 20/21.</p>	<p>95% of our schools are rated good or outstanding. This proportion is above the London and national averages. All of the Council's secondary schools continue to be judged good with the proportion judged to be outstanding rising to 63% (well above national and local averages).</p> <p>National rankings in relation to pupil outcomes continue to be strong in the progress measures at KS2 and GCSE. outstanding.</p> <p>We do well for our vulnerable learners. The proportion of young people who are not in Education, Employment or Training (NEET) are significantly better than national averages and Merton continues to be in the top quintile of performance nationally.</p>
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Where are we now?

Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
<p>Implementation and mobilisation of new Family Wellbeing Service</p> <p>Review of allied teams and services with CSC& YI and the Education Division to support improved ways of working.</p>	<p>The new service is established. Objective met.</p> <p>The re-organisation included a review of allied teams and services across early help, aiming in improved ways of working. Objective met.</p>	Close
<p>Improve pupil outcomes at KS5 & School Improvement through partnership with schools</p>	<p>During 19/20, the school's partnership, Attain, funded a project involving The Prince's Trust, designed to support the improvement of teachers' pedagogy and subject knowledge in the 6th form. In addition, masterclasses from A level examining boards were set up, and Merton teachers were encouraged to become examiners themselves (to develop clarity about what was being asked of students in the A level exams). Five out of the eight Merton secondary worked on this project. Merton School Improvement facilitated this project, and the sixth forms in four out of the eight schools had reviews of their provision.</p> <p>There were no examinations in summer 2020 nor summer 2021 because of the pandemic, and so it is not possible to measure the impact of this work yet. In 2021-2022, MEP Inspectors are again visiting schools and working with school leaders to review and evaluate sixth form provision.</p>	Close
<p>SENDIS IT Infrastructure programme</p> <ul style="list-style-type: none"> - Introduction of an EHCP Hub - Introduction of an electronic case management system -Migrate existing EHCPs to the portal <p>agree approaches for the migration of existing SEN, Sensory and Ed Psych team documents</p>	<p>The SEN Team went live with Synergy case management system in September 2021. The EHCP Hub is phase 2 of the IT Infrastructure Plan and will carry over in the financial year 21/22.</p> <p>Case Management System - Sensory and Education Psychology are not in this IT infrastructure programme and will be part of Phase 3 which will require a new business case and will also include the LBM SALT services.</p>	Carry forward

<p>Implement SEND Action Plan and DSG recovery plan</p> <ul style="list-style-type: none"> - widen local offer - preparation of adult and early identification pathways - strengthen governance of SEND Implementation Plan 	<p>As part of our work to prepare for re-inspection and the wider discussions with the DfE around additional funding to support local SEND services, we are in the process of updating SEND strategy. The strategy is supported by an action plan the delivery of which is overseen by a multi-agency board with representation from across the council and health services. The partnership continues to focus on DSG recovery through engagement with the DfE about the council's engagement with their 'Safety Valve' programme.</p>	Carry forward
<p>Implementation of Secondary & Special School (SEN) Places Strategy</p> <ul style="list-style-type: none"> - provide additional state school places in Merton with a focus on Melrose expansion and an additional site for children with ASD 	<p>Completed expansion of Cricket Green School in summer 2020; expansion at Melrose school completed in September 2021. As part of our SEND strategy, two primary school ARPS will also be expanded for September 2022. Further plans for increased special school places being created in line with the council's strategy.</p>	Carry forward
<p>SEN Transport commissioning review</p>	<p>Now one of the council's transportation projects with a series of workstreams being delivered. A public consultation on transport policy and practice commenced in November and completes on 5 January 2022.</p>	Carry forward
<p>Early Help (Front Door/Thresholds)</p> <ul style="list-style-type: none"> - review current wellbeing model (thresholds document) - put in place integrated responses based on shared understanding of risk and need 	<p>The new Family Wellbeing Service has been established and went live in April 2020.</p> <p>Over the course of this year, we have worked with partners to refresh the existing wellbeing model. This has now been agreed by the Merton Safeguarding Children Partnership.</p> <p>The development of a new 'front door' based on the revision of thresholds has begun. The task for next year will be to embed these processes across partners.</p>	Close

How will we get there?

Try to limit this to no more than around 5-7 key objectives. This section should be reviewed if there are any significant changes in direction during the year. Changes can be noted along with the reasons for and implications of the change. When you review this, look for opportunities, insights, or risks that have emerged.

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the
<i>Embed the council's approach to Early Help and Family Wellbeing</i>	Support our most vulnerable residents of all ages
	Create a great place to grow up and live in
	Build resilient communities

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of contacts to the front door	Internal Measure	Does Not Apply	n/a	n/a	n/a	n/a	n/a	Quarterly	Low
% of contacts becoming referrals to children's social care	Internal Measure	Does Not Apply	n/a	n/a	n/a	n/a	n/a	Quarterly	High
Number of CIN Plans	Internal Measure	Does Not Apply	n/a	n/a	n/a	n/a	n/a	Monthly	Low
Number of two-year olds who are accessing two-year old funding per term	Internal Measure	Does Not Apply	n/a	n/a	n/a	n/a	n/a	Annually	High

Projects / key activities to support the objective *(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)*

Project / activity name	Description	Proposed start date	Proposed end date
<i>Multi-agency approach to Early Help</i>	Following the agreement of thresholds, work with partners to embed our approach to Family Support in Merton as outlined in the 'Effective Support' document which includes roll-out of multi-agency training on the new approach to EH in Merton in line with I thrive	Apr-22	Mar-23
<i>Embed Supporting Families Framework</i>	Data alignment and system change in line with supporting families model	Apr-22	Mar-23

Potential barriers to achieving objective

Description of barrier	Mitigating Actions
<i>Capacity in the system to re align services whilst managing pandemic</i>	<i>Timescales for supporting families realignment may need to be delayed</i>
<i>Willingness of wider partnership to provide effective early help interventions and understanding of the early help thresholds.</i>	<i>Effective application of thresholds and clarity of remit of FWB. Work with partners to strengthen universal and Early Help services in the borough.</i>
<i>Processes to share information quickly and seamlessly in support of step-up and step-down processes not embedded effectively</i>	<i>Clear thresholds articulated in the Effective Support document and step-up and step-down processes agreed across services</i>

Impact on the customer/end user

Children and their families are supported effectively where statutory intervention is not required.

Partners / interdependencies

Children's Social Care; wider partners within the Early Help system.

Service Objective 2	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
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<i>Deliver the SEND Strategy Action Plan overseen by the new SEND board and CYP Integrated Commissioning Group. (Comprehensive response to the Written Statement of Action is documented elsewhere and not repeated here)</i>				Support our most vulnerable residents of all ages					
				Statutory requirement					
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% of new EHCP requests completed within 20 weeks	32.75%	Red	Within range 50% - 60%	Within range 50% - 60%	Targets reviewed annually	Targets reviewed annually	Targets reviewed annually	Quarterly	Within a range
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
<i>Deliver SEND Strategy Action Plan</i>	Embed the 'outcome champion' approach and provide robust scrutiny against agreed action.						<i>Apr-22</i>	<i>Mar-23</i>	
Potential barriers to achieving objective									
Description of barrier					Mitigating Actions				
<i>Partnership buy-in reduces and actions are not delivered.</i>					<i>Strong Governance arrangements (via SEND Board).. Escalation to Children's Trust Board and Joint Commissioning Board where required.</i>				
<i>Continued rising number of EHCPs puts pressure on services to provide professional advice in a timely way.</i>					<i>Children and Young People integrated commissioning board is focussing on actions to prevent escalation of needs and streamline professional advice.</i>				
Impact on the customer/end user									
<i>Improved partnership working to support children with additional educational needs.</i>									
Partners / interdependencies									
<i>Partnership with CCG and Health Providers crucial. Link to adult social care to establish transition pathway.</i>									
Service Objective 3									
<i>Maximise pupil outcomes following the pandemic to improve pupil progress and attainment.</i>				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the					
				Continuously improve					
				Support our most vulnerable residents of all ages					
				Bridge the gap and reduce inequalities					
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% outcome of Ofsted schools inspections good or outstanding	95%	Green	95%	95%	95%	95%	95%	Annually	High
Merton pupil average Attainment 8 score	53.1	Red	Top 10% of the country (average top 10% result was 57.5)	Top 10% of the country	Top 10% of the country	Top 10% of the country	Top 10% of the country	Annually	Benchmark
Merton pupil average Progress 8 score	Not measured due to cancellation of GCSEs	Does Not Apply	Top 10% of the country	Top 10% of the country	Top 10% of the country	Top 10% of the country	Top 10% of the country	Annually	Benchmark
% pupils achieving expected standard at KS 2 in reading, writing and maths	Assessments cancelled due to Covid19	Does Not Apply	Top 10% of the country	Top 10% of the country	Top 10% of the country	Top 10% of the country	Top 10% of the country	Annually	Benchmark

% 16 - 17 year olds Not in Education, Employment or Training (NEETs)	1.3%	Green	To be below London average	To be below London average	To be below London average	To be below London average	To be below London average	Quarterly	Benchmark	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Work with schools to re-focus on school improvement activities	The MEP programme will ensure that school leaders are supported and challenged to focus on school improvement priorities, as well as responding to the ongoing pandemic. Support and Challenge Groups will support the most vulnerable schools.						Apr-22		Mar-23	
Work with schools to support implementation using catch-up funding	The MEP programme will monitor how schools are implementing catch up programmes, including those funded by the DfE. Impact will also be monitored. Schools will be encouraged to set appropriately challenging expectations for pupil outcomes following learning loss during lockdown.						Apr-22		Mar-23	
Monitor the delivery of remote learning offer if required	Building on the remote learning strategy already created with schools, schools' remote learning offer will be monitored, and support given to improve the offer.						Apr-22		Mar-23	
Support staff wellbeing particularly for leaders	Officers will offer ongoing support to Headteachers, both responding to the Covid situation and on broader school issues. The schools' partnership, 'Attain' will be asked to fund supervision for HTs. MEPs will monitor and advise on leaders' strategies to ensure the wellbeing of their staff. Officers will facilitate the meetings of school mental health leads to share information and best practice.						Apr-22		Mar-23	
Support schools to prepare for Summer 2022 exams	Officers will provide schools with support to prepare for the exams. Schools will be provided with briefings about what the changed expectations						Sep-22		Jul-23	
Support schools for resumption of Ofsted inspections	Schools will be regularly briefed on Ofsted expectations and feedback from inspections. MEPs will support schools to be ready for inspection. The schools' partnership will be asked again to fund school reviews, to prepare schools for inspection.						Apr-22		Jul-23	
Potential barriers to achieving objective										
Description of barrier						Mitigating Actions				
Pandemic will interrupt resumption of normal school activity for some schools						Support schools to ensure control measures are in place to minimise the risk of in school infection, and to manage cases well, including maintaining good provision remotely and in person.				
Pupils' access to online remote learning is impeded by lack of digital devices and access to Wi-Fi						Support schools to access devices from DfE and local charities.				
Ongoing impact of the pandemic on staffing and leadership						Regular feedback with schools collectively and individually to support school capacity				
Impact on the customer/end user										
Pupils will achieve to the best of their ability, as a result of at least good education in their school										
Partners / interdependencies										
Schools										
Service Objective 4						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				

SEND IT infrastructure improvements				Support our most vulnerable residents of all ages					
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% of new EHCP requests completed within 20 weeks	32.75%	Red	Within range 50% - 60%	Within range 50% 60%	Targets reviewed annually	Targets reviewed annually	Targets reviewed annually	Quarterly	Within a range
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date		Proposed end date
Synergy	Migrate the Sensory team, EP and SALT to Synergy case management system. Embed Synergy system and ensure it allows clear monthly reporting on finance as well as case management.						Apr-22		Sep-23
EHCP hub	Scope system to allow contributions to EHCNAs/EHCPs to be centrally coordinated						Apr-22		Sep-23
Potential barriers to achieving objective									
Description of barrier					Mitigating Actions				
Roll-out is not supported by partner agencies					Strong communication via project team.				
Synergy cannot provide reports required					set up alternative systems				
Impact on the customer/end user									
Greater ownership of EHCP, and improved EHCP process.									
Partners / interdependencies									
Parents/Carers, IT, health commissioners and providers, schools across all phases (primary, secondary and specialist), children's social care.									
Service Objective 5				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Implement the Safety Valve plan re DSG overspend				Statutory requirement					
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of children supported by an EHCP	2252	Does Not Apply	2525	2785	3045	3305	3565	Quarterly	Within a range
DSG deficit	24983406	Does Not Apply	37597219	44582689	49821293	47687912	41691837	Quarterly	Within a range
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date		Proposed end date
Delivering further state school specialist provision	Additional provision developed in line with the Safety Valve plan in ARPs and Special schools to reduce reliance on out of borough independent school placements						Apr-22		Mar-27
Develop effective graduated response to hold more children at SEND support	Develop capacity in schools and give confidence to parents in provision at SEND support in order to reduce demand for EHCPS						Apr-22		Mar-27

Improve focus on EHCP outcomes and spend	Reduced case loads for SENDIS workers allowing for more granular focus on outcomes and spend.						Apr-22	Mar-23	
Potential barriers to achieving objective									
<i>Description of barrier</i>				<i>Mitigating Actions</i>					
Support from schools/colleges does not develop as expected				Safety valve actions and partnership engagement					
Parental perception and confidence does not support actions				Engagement with Kids First, and through schools, with parents collectively and individually					
Therapy provision from health partnership does not support actions				Governance from CYP Integrated Commissioning Board					
Safety Valve objectives not achieved				Governance from SEND board					
Impact on the customer/end user									
Childre and young people with SEND supported well at appropriate level of support; schools and colleagues enabled to support more children and young people at SEND support; parents have confidence in provision.									
Partners / interdependencies									
CCG, commissioned health providers, Children's Social Care, early years providers, schools and colleges.									
Service Objective 6				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Contribute to the delivery of the corporate recovery and modernisation programme				Continuously improve					
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	
SEN Transport commissioning	Implement the outcomes of the transport consultation and delver other efficiencies as part of the transport tranformation project					Jan-22		Mar-23	
Potential barriers to achieving objective									
<i>Description of barrier</i>				<i>Mitigating Actions</i>					
Uncertain budget				Work with finance colleagues to understand budget envelope					
Impact on the customer/end user									
Children and families with special educational needs									
Partners / interdependencies									
Transport Team in E&R Adult Social Care									
Service Objective 7				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Improve support for children and young people's mental health in schools and colleges				Support our most vulnerable residents of all ages					
				Create a great place to grow up and live in					
				Build resilient communities					

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Percentage of Merton schools accessing a getting help school mental health team and implementing a whole school model	Reported internally	Does not apply	Local measure	Local measure	Targets reviewed annually	Targets reviewed annually	Targets reviewed annually	Annual	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Develop the Wimbledon mental health Partnership	Develop the last cluster so all schools in Merton will have been offered the opportunity to be in a Mental Health in schools partnership						Apr-22	Mar-23	
Respond to the findings of the youth survey with regards to mental health support	Mental health leads network - better align the network with the work of the clusters; with CCG run multi agency mental health network to improve quality of offer; publicize the offer; work with Collaborate to develop community capacity to support well being						Apr-22	Mar-23	
I thrive - improve risk support	Work involving CAMHS, Early Help, Children's Social Care and Merton schools to improve risk support in line with I Thrive's principles						Apr-22	Mar-23	
Improve the Neuro pathways	Work with the CCG and SWL to improve the Neuro pathway experience of children and families and reduce diagnosis time.						Apr-22	Mar-23	
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
CCG funding limits re Covid restrictions						Oversight by CAMHS board			
Non engagement of partners due to pandemic						Oversight by partnership board led by CCG across 5 boroughs			
School capacity to meet demand and change expectations						Work with school leaders to manage the change program over time			
Neuro pathway has a high dependency on SWLSTG delivery						Oversight by CCG and CAMHS board			
Impact on the customer/end user									
Improved skills and capacity to identify and support children and young people with mental health needs in schools. Schools and Colleges understanding of young people's needs will improve and be planned for. Access to mental health support to be easier to access and available at a lower level of need.									
Partners / interdependencies									
CCG, schools, South West London and St Georges Mental Health Trust (SWLSTG), 5 borough CCGs, Sutton Schools' cluster, South Thames College FE group, Richmond College, Croydon College. Off the Record, Children's Social Care. I thrive implementation team.									
Service Objective 8						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions			
Short-breaks review						Support our most vulnerable residents of all ages			
						Create a great place to grow up and live in			
						Build resilient communities			
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	

<i>Publish the findings/recommendations from the review of short breaks</i>	<i>Carry out a review of short breaks with key stakeholders and partners, co-producing with families, young people and children</i>	<i>Apr-22</i>	<i>Sep-22</i>
<i>Re-state the short break offer balancing the findings from the review with available budgetary envelopes</i>	<i>Deliver the new and revised local offer of short breaks</i>	<i>Sep-22</i>	<i>Mar-23</i>
Potential barriers to achieving objective			
Description of barrier		Mitigating Actions	
<i>Meeting savings challenge of £200k</i>		<i>Evidence based decision-making based on comprehensive review of need</i>	
<i>Securing effective engagement from key partners in health and education</i>		<i>Robust governance arrangements and early engagement with colleagues in finance</i>	
<i>Complexity of current model and capacity to support the review in light of pandemic pressures</i>		<i>Additional apacity to support the review</i>	
Impact on the customer/end user			
<i>Improved access to a range of short break provider services within the local offer (self-serve) and within financial envelopes. Easier navigation/pathways to services without need for non-statutory assessment.</i>			
Partners / interdependencies			
<i>Children's Social Care</i>			

People

Staff are supported to access training as appropriate.

We continue to support remote working where appropriate to service deliver/in line with national/local Covid measures and have offered support for this to happen safely.

The SEND service will be supported by further investment from the Council, and recruitment to new roles has begun.

Ongoing review of our SENDIS and SALT services will impact on the configuration of these teams, to enable us to best meet the needs of children and their families, and of schools, in line with our SEND strategy.

We have rolled out joint training with health partners (National Development Team - Inclusion).

As part of wider Early Help reforms, we are prioritising the roll-out of training which aligns to the practice model used in children's social care. This will support effective alignment between statutory and non-statutory work with families.

Technology

The SENDIS service is benefitting from the introduction of an electronic case management system, and of an EHCP hub. This will make workflows more efficient and increase our information governance processes.

As part of the Early Help Reforms, workflows are being introduced on Mosaic Case management system. This will make case management processes more efficient and will also enable better performance reporting and service management.

As part of wider Early Help reforms, we are using the Supported Families Grant to explore how we can better link data held across the council to understand need and risk of our most vulnerable families. The 'Insight to Intervention' project will provide the council with a clear road-map to enhance digital maturity.

As part of improvements to the way in which we support children and young people into adulthood, new workflows and systems are being developed in Mosaic. This work is led by Adult Social Care and we are contributing.

As a division, home working will remain more common and we are equipping our staff to make sure they can work at home where it is safe to do so. This will require ongoing engagement with colleagues in IT to facilitate access to effective communication technology.

Service improvement

The DSG overspend continues to be an area of focus for the education division. As part of 'safety valve' negotiation with the DfE we have put forward an ambitious programme of co-ordinated work to address the DSG overspend. This will be a key focus for our division in 2021/22 and beyond. As part of this work, we have already strengthened governance arrangements. The CYP Joint Commissioning Board (jointly chaired by the CCG and LBM) now receives more regular updates, and provides closer oversight, and there will be a new SEND Board chaired by the Chief Executive.

As part of council-wide recovery and transformation actions, we continue to monitor and improve our SEN Transport offer. This continues to be an area of focus.

We are also aware of funding pressures regarding the use of short breaks. In response we are continuing the review started in 21/22 to better understand need, and to better match our service offer to identified need and existing budgetary envelopes.

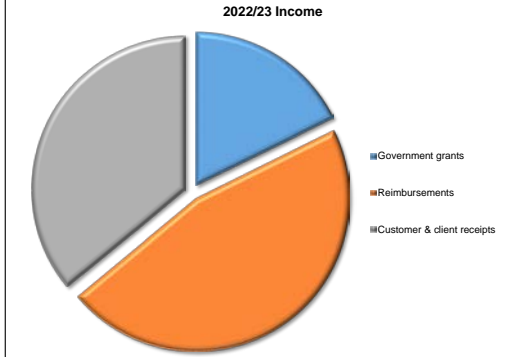
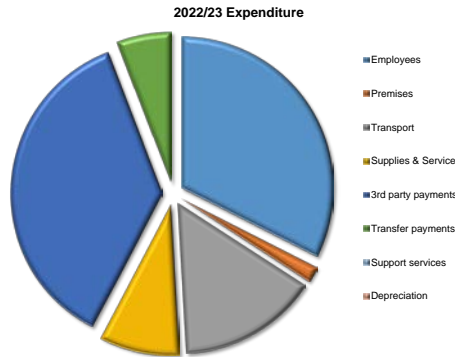
In 2021/22, we have continued to embed our integrated Early Help service. This work has been underpinned by the delivery of a multi-agency strategy overseen by the Merton Safeguarding Children Partnership. The council continues to play a lead role and our focus for the next financial year will be the engagement with delivery partners in education and the voluntary / faith sector.

Financial Summary

The medium term impact of the Covid19 pandemic is still not completely certain within this service. The biggest challenge will be implementing the recommendations of the proposed Safety Valve Plan which will present significant delivery challenges this year.

DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2024/25
Expenditure	44,098	54,631	44,683	11,200	45,120	30,959	45,958	46,258
Employees	14,299	13,030	14,556	(235)	14,647	14,698,450	14,700	14,701
Premises	974	891	1,013	36	777	808	832	856
Transport	6,140	4,817	6,265	38	6,729	7,068	7,227	7,386
Supplies & Services	4,179	6,896	3,399	3,806	3,871	3,949	4,027	4,105
3rd party payments	15,405	26,095	16,370	7,556	16,452	16,490	16,528	16,566
Transfer payments	0	0	0	0	2,644	2,644	2,644	2,644
Support services	2,664	2,465	2,644	0	0	0	0	0
Depreciation	436	436	436	0	0	0	0	0
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P6	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2024/25
Income	6,543	6,492	5,619	(624)	6,428	6,428	6,428	6,428
Government grants	1,399	1,887	655	(714)	1,059	1,059	1,059	1,059
Reimbursements	2,902	3,129	2,774	(243)	2,774	2,774	2,774	2,774
Customer & client receipts	2,243	1,475	2,190	334	2,159	2,159	2,159	2,159
Interest	0	0	0	0	0	0	0	0
Reserves	0	0	0	0	0	0	0	0
Capital Funded	0	0	0	0	436	436	436	436
Council Funded Net Budget	37,555	48,139	39,064	11,824	38,692	24,531	39,530	39,830
Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2024/25
Primary Schools		829	3,083	0	3,018	2,500	2,500	2,500
Secondary Schools		13	544	0	65	0	0	0
Special Schools		1,121	3,424	0	2,740	0	0	0
Other		350	591	0	212	0	0	0
	0	2,312	7,642	0	6,035	2,500	2,500	2,500



Summary of major budget etc. changes

Year	Summary of major budget etc. changes
2022/23	£200k Early Years and Children's Centres - staffing and building maintenance. £78k office efficiency within service (£50k) and £28k rationalisation with Education Inclusion £100k School Meal PFI - ot within this service area but identified for completeness.
2023/24	Growth £174k EHCP Taxi Transport £50k SEN Additional
2024/25	Growth - £180k EHCP Taxi Transport, £50k SEN additional staffing
2025/26	

Community & Housing

Service Plan for : Commissioning and Market Development

Service Manager: Keith Burns Cabinet Member: Cllr Rebecca Lanning

Overview of the service

The Commissioning and Market Development service supports the delivery of Adult Social Care in Merton in a range of ways by:

1. Analysing current and likely future demand for adult social care and commissioning services to meet that demand in a way that delivers quality for service users and good value for the Council;
2. Supporting the delivery of a range of Council and Departmental strategies;
3. Procuring, in compliance with the Council's Contract Standing Orders and other relevant policy and guidance, suppliers to deliver required services;
4. Managing contracts and provider relationships;
5. Maintaining oversight of the whole social care market in compliance with our Care Act market oversight responsibilities;
6. Supporting individuals choosing to use a Direct Payment to purchase their care and support and ensuring that Direct Payments are managed and monitored in compliance with legislation and the Council's Financial Standing Orders;
7. Undertaking assessments of individuals' ability to contribute to the cost of the care and support provided to them in compliance with the Care Act, related legislation and guidance and relevant Council policies;
8. Brokering individual placements or packages of community based care and support as required by individual care and support plans. Ensuring that contractual arrangements in respect of these placements / packages of care and support are compliant with the Council's Contract Standing Orders;
9. Analysing data and soft intelligence in order to: report on performance against Departmental and Corporate performance measures and targets; to ensure completion of statutory returns to central Government; and to inform the development and delivery of Departmental and Council strategies and plans.

Merton's ambitions

It is important that the activity in your service plan has a clear link to helping achieve the council's overall ambitions. Please consider these ambitions when developing your plan and ensure that activity and projects are matched against them:

Support our most vulnerable residents of all ages
 Maintain a clean and safe environment
 Create a great place to grow up and live in
 Build resilient communities
 Bridge the gap and reduce inequalities
 Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
All ASC Customers eligible for a service will receive person centred support. For all new ASC Customers who have been discharged from hospital we aim to have them return to	Our primary role, from a Commissioning and Market Development perspective, is to facilitate, either through our commissioning activity or our market influencing activities, the	Local authorities across London and nationally are encouraged to promote and encourage person centred support for ASC customers, using direct payments to enable people to	Our approach to the commissioning of services and our wider market facilitation role is based around an expectation of continuous improvement, both in terms of the quality,

<p>their own homes and be supported to remain as independent as possible, this is under our "Home First" framework of delivering care and support and includes a period of reablement, ongoing assessment and review. All ASC customers in receipt of care and support are entitled to an annual review carried out by the Social Work / Occupational Therapy teams, the care and support plan is also reviewed with the individual, their family /carers and updated accordingly.</p> <p>From a Commissioning and Market Development perspective our primary role in delivering against these requirements is in ensuring that a range of commissioned services appropriate to meeting assessed need are in place; that there is a broad and vibrant social care market locally for use by individuals using Direct Payments or managing their own care.</p>	<p>maintenance of sufficient capacity in the social care market to ensure that as the population of the borough changes (increasing numbers of older residents and changes in the profile of working age adults and young people requiring care and support) sufficient services of good quality remain available to meet needs. During 2022 we will be developing longer term commissioning strategies that set out in more detail the demographic changes we expect to see and how our commissioning response will adapt to those changes.</p>	<p>choose their own care and support. The organised activities which are in place are often commissioned from voluntary sector partners and are based in local community settings. Furthermore, during the pandemic and moving forward, key expectations of LAs and CCGs in their delivery of direct payments and personal health budgets are to support people's continuing care and support needs and to manage and mitigate the impacts of COVID-19 via increasing the take up of (and allowing flexibility) the use of Direct payments.</p> <p>The Commissioning Strategies to be developed during 2022 will also set out how we intend responding to the 'People at the Heart of Care' White Paper published in December 2021, and in particular Chapters 4 and 6 of that document (Providing the Right Care in the Right Place, at the Right Time; and Our Strategy for the Social Care Workforce). Work on implementing arrangements for managing Care Accounts, and in respect of new requirements for fair funding will also be key priorities for 2022/23.</p>	<p>effectiveness and value for money of the services we contract for and of the processes and procedures we follow in our commissioning and contract management practice.</p> <p>Our operational services (Direct Payment, Brokerage and Financial Assessment teams) have a similar continuous improvement focus in terms of processes and customer service.</p> <p>Our Performance Team support the Department in driving up service quality by providing the necessary reporting and analysis of performance and quality assurance data.</p> <p>The key objectives and projects set out in this plan include a number specifically intended to support delivery of the Department's Reset and Recovery programme.</p>
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Where are we now?

Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
<p>(Service Plan 2020-24) We will develop the commissioning, contract management and quality assurance functions necessary to ensure Merton has sufficient supply of diverse and sustainable care provider markets to meet the care and support needs of borough residents either through direct commissioning activity or indirect market shaping activity. This project will also incorporate current commissioning and procurement activity for a range of services provided by third party suppliers.</p>	<p>1. A new structure for the Commissioning and Market Development service has been developed and the restructure process completed. A small number of posts remain vacant following the restructure and are being recruited to.</p> <p>2. A work programme covering the period 2020 to 2024 and encompassing the recommissioning of all existing ASC contracts with providers has been developed and lead commissioners / contract managers have been identified for each element of the work programme. This approach will be widened to cover all of C&H by the end of April 2022.</p> <p>3. Relationships with the care sector in Merton have been considerably strengthened as a result of our response to the challenges of COVID19.</p>	<p>Carry forward</p>
<p>(TOM ASC8) Work with partners and stakeholders to develop a framework for supported living for people with physical and learning disabilities and mental health issues, to promote choice and independence.</p>	<p>In progress and scheduled to be complete by Summer 2022 (delayed as a result of continuing focus on COVID-19 related activities).</p>	<p>Carry forward</p>
<p>(TOM ASC10) Develop an adults commissioning model.</p>	<p>In progress and refined into a number of specific projects detailed in the delivery plan section of this service plan.</p>	<p>Carry forward</p>
<p>(Service Plan 2021/22) Delivery Plan Objectives</p>	<p>There have been some delays in progressing actions under individual Service Plan objectives, primarily as a result of delays in recruitment and the continuing impact of COVID-19 related activity. Where actions remain to be completed these have been re-profiled in the Delivery Plan and new actions added as appropriate. Completed actions have been removed.</p>	<p>Carry forward</p>

How will we get there?

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
<i>Develop and deliver a new commissioning and market facilitation / oversight model for adult social care</i>	Support our most vulnerable residents of all ages
	Build resilient communities
	Continuously improve

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)			
Project / activity name	Description	Proposed start date	Proposed end date
Commissioning Strategy development	Development of a document that describes our overall approach to commissioning for excellence	Sep-21	Apr-22
Refreshed Market Position statements	Development of a suite of Market Position Statements that provide clarity to the market about our future commissioning plans and the rationale underpinning them.	Jan-22	Jun-22
Care at home 2023 (Home Care recommissioning)	Development and delivery of an agreed approach to the future commissioning of home care in Merton.	Sep-21	Aug-23
Bed-based care strategy 2021 – 2030 (Sustainability and change)	A strategy setting out our long term plans to reshape the bed based care market in Merton, encompassing nursing and residential care and supported housing settings.	Dec-21	Jun-22

Potential barriers to achieving objective	
Description of barrier	Mitigating Actions
Continuing impact of COVID19 on priorities and capacity	Rescheduling of project start dates where feasible.

Impact on the customer/end user
Improved quality of service for service users; better value for council tax payers and increased clarity for service providers.

Partners / interdependencies
Operational teams across ASC; Housing Needs; Future Merton

Service Objective 2	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
<i>Supporting delivery of the Learning Disabilities Recovery and Reset programme</i>	Support our most vulnerable residents of all ages
	Create a great place to grow up and live in
	Bridge the gap and reduce inequalities

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	
Expanding the availability of accommodation based care and support options	Development of new procurement and contractual arrangements for accommodation, care and support (supported housing) and residential care. Market development activities to encourage new providers into the borough.					In progress		Jul-22	
Delivering the right programme support	Ensuring that any necessary external support or expertise required for programme delivery is procured and delivered in a timely and cost effective way.					In progress		Ongoing through 2022/23	
Enabling the re-modelling and re-provision of in-house services	Delivering all necessary contributions to options appraisal and service redesign processes. Enabling delivery of all necessary commissioning and procurement activity.					Jan-21		Ongoing through 2022/23	
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
<i>Lack of available market options</i>					<i>Market development work programme referenced in service objective 1 above</i>				
<i>Political / community concern</i>					<i>Programme communication and engagement strategy</i>				
Impact on the customer/end user									
<i>Improved quality of service for customers and better value for council tax payers.</i>									
Partners / interdependencies									
<i>Service users and carers; Learning Disability service; Direct Service Provision team; Future Merton; Asset Management.</i>									
Service Objective 3					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				
<i>To ensure that new Direct Payment customers can be signed up as quickly and efficiently as possible and that existing customers continue to receive a uniformly high quality of service.</i>					Support our most vulnerable residents of all ages				
					Continuously improve				
					Statutory requirement				
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
(LI) Time from referral to account set up completed	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Quarterly	Low
(LI) Compliments recorded	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Annually	High
(LI) Number of DP Forums held per annum	TBC	Not Yet Known	4	6	6	6		Annually	Benchmark
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	
Process review and redesign	End to end review and redesign of DP process to identify and implement appropriate process improvements as part of wider ASC work					Jan-22		Jun-22	

Quality Assurance review	Review QA processes and resources assigned to supporting existing customers and deliver improvements where identified and feasible.						Jan-22	Jun-22	
Restart Direct Payment Forum meetings	Restart programme of regular DP forums to enable customers to discuss relevant issues, suggest improvements and to share information.						Jan-22	Ongoing through 2022/23	
Improve knowledge and awareness of Direct Payments	Develop and deliver a programme of training and communication for social workers, OTs and other relevant professionals to ensure that the benefits of DPs are understood and factored in to daily practice as a positive option for customers.						Mar-21	Ongoing through 2022/23	
Potential barriers to achieving objective									
<i>Description of barrier</i>						<i>Mitigating Actions</i>			
<i>Resources available to complete review / redesign work</i>						<i>Support from Continuous Improvement team</i>			
Impact on the customer/end user									
<i>Improved quality and responsiveness of service.</i>									
Partners / interdependencies									
Service Objective 4									
						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions			
<i>To ensure that Financial Assessments continue to be completed in a timely and accurate fashion and that new and existing customers experience consistently high quality customer service.</i>						Support our most vulnerable residents of all ages			
						Continuously improve			
						Statutory requirement			
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
(LI) Time from referral to assessment completed	n/a	Does Not Apply	TBC	TBC	TBC	TBC		Quarterly	Low
(LI) Compliments recorded	n/a	Does Not Apply	TBC	TBC	TBC	TBC		Annually	High
(LI) Debt as proportion of income collected	n/a	Does Not Apply	TBC	TBC	TBC	TBC		Quarterly	Low
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date		Proposed end date
<i>Debt recovery</i>	Continue working with Debt Recovery team to reduce the overall level of debt outstanding as a proportion of income collected.						<i>In progress</i>		<i>Ongoing through 2022/23</i>
<i>Review Financial Assessment Policy and Procedures</i>	Review and update policy and procedures to ensure up to date and fit for purpose in terms of delivering consistently high quality and responsive customer service						<i>Sep-21</i>		<i>Apr-22</i>
<i>Review approach to Disability Related Expenditure</i>	Working with Merton Centre for Independent Living to review our approach to DRE and ensure this is effectively communicated						<i>In progress</i>		<i>Apr-22</i>
<i>Implementation of Care Accounts and automation/self-service</i>	Preparing for the implementation of Care Accounts from April 2023						<i>Jan-22</i>		<i>Mar-23</i>

Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
Team capacity					Ensure recruitment to remaining vacant posts is completed.					
Impact on the customer/end user										
Improved service quality for customers and better value for council tax payers.										
Partners / interdependencies										
Service users and carers; ASC Operational Teams; Debt Recovery; SLLP										
Service Objective 5					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Ensure that existing and new contracts are effectively managed and monitored in line with Contract Standing Orders and best practice.					Support our most vulnerable residents of all ages					
					Continuously improve					
					Statutory requirement					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
n/a										
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Contract File management	Develop and implement a consistent system for the management of all ASC contracts team files which is used by the whole team						Jan-21		Apr-22	
Implementation of new Council Contract Management Handbook	Review current practice and procedures against new Contract Management Handbook, and implement necessary changes to ensure full compliance.						Ongoing		Ongoing through 2022/23	
Minimise 'off-contract' spend.	Ensure that all contractual activity, including spot purchasing of care placements, is properly recorded on contract register						In progress		Ongoing through 2022/23	
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
Team capacity					Ensure any vacancies are filled as quickly as possible.					
Spot purchasing difficult to record via contract register					Agree methodology for recording spend with Commercial Services					
Impact on the customer/end user										
Reduced risk of poor quality care being provided.										
Partners / interdependencies										
Providers; ASC Operational Teams: Commissioning; Care Quality Commission										

Service Objective 6				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
<i>Continue to improve the responsiveness and quality of Brokerage services provided.</i>				Support our most vulnerable residents of all ages						
				Continuously improve						
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
n/a										
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Care placement costing</i>	Complete implementation of CareCubed cost calculator and use for all new placements (initially working age adults)						<i>Dec-21</i>		<i>Apr-22</i>	
<i>Review of Individual Service Agreement</i>	Review existing Individual Service Agreement template; identify improvements and implement new template						<i>Nov-21</i>		<i>Apr-22</i>	
<i>Carers services process</i>	Development and implementation of a process for recording services provided to carers on Mosaic						<i>Sep-21</i>		<i>Apr-22</i>	
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
Impact on the customer/end user										
<i>Improved quality of service for customers and better value for council tax payers.</i>										
Partners / interdependencies										
<i>Commissioning and Contracts teams; ASC Operational teams; SLLP</i>										

People

During 2022/23 we will continue work to embed the new service structure following the delayed completion of the restructure process during 2021/22.

Specific people development activities to be undertaken include:

1. Maintaining the schedule of regular team meetings (at least monthly) and whole service meetings (via Teams) which was put in place during 2021;
2. Head of Service to attend two team meetings per year for each team within the service;
3. Fortnightly all service emails from Head of Service;
4. Completion of a learning and development plan for the restructured service based on individual learning and development audits;
5. Through development of a more project based approach to work we aim to provide opportunities for individuals to develop via membership of project teams in areas of work outside of their day to day roles.

Technology

Projects planned for 2022/23 that include specific technology related requirements include:

1. Completion of the roll out of the new Electronic Care Monitoring (ECM) solution to a wider group of home care providers (no new software or hardware required, but technical support likely to be needed);
2. Exploration of software solutions to support better contract file management;
4. Completion of the Robotic Process Automation project with Financial Assessment team;
5. Continued development of a Power BI framework for performance management and other reporting requirements.
6. Development of a solution for the management of Care Accounts (by April 2023).

Service improvement

The key service and process improvements activities planned for 2022/23 are identified as projects under the objectives in the Delivery Plan section of this service plan.

Direct Provision (Adult Social Care)			
Service Manager: <i>Andy Ottaway-Searle</i>		Cabinet Member: <i>Cllr Rebecca Lanning</i>	
Overview of the service			
<i>Provide a brief overview of your service and the outcomes it seeks to provide for residents/service users, including any statutory duties that impacts on this</i>			
<i>Direct Provision is part of Merton's Adult Social Care service, sited in Community and Housing. The majority of service provision is for people with a learning disability, with services also for older people and a small number of people with a physical disability. Apart from self funding customers (mainly in Mascot Telecare) customers are referred by Social Workers following a review, and the provision is part of a package designed to meet that person's assessed needs. The aim is to ensure that people are supported in an individual way and they can learn, develop or maintain skills which ensure that they can participate in community life and remain as independent as they can be and in their own home for as long as possible. Direct Provision currently has four day centres, two residential homes, five sites for supported living, an extra care sheltered housing scheme, Mascot Telecare and an employment team.</i>			
This could include survey results, consultations, complaints/compliments and set how the way in which you are planning to deliver your service reflects feedback from			
<i>It is important that the activity in your service plan has a clear link to helping achieve the council's overall ambitions. Please consider these ambitions when developing your plan and ensure that activity and projects are matched against them:</i>			
<p>Support our most vulnerable residents of all ages</p> <p>Maintain a clean and safe environment</p> <p>Create a great place to grow up and live in</p> <p>Build resilient communities</p> <p>Bridge the gap and reduce inequalities</p> <p>Continuously improve</p>			
What do we need to do?			
<i>In developing your plan it is important to understand the wider context in which the service and the council operates. Please refer to Merton Data as a tool to help you understand the present and future demands on your service and the views and needs of its customers. This should be combined with local intelligence held by your service.</i>			
Merton Data		The Merton Story	
Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<i>All Direct Provision ASC Customers have an annual review organised by the social work teams. Following this a care and support plan is developed which is updated regularly.</i>	<i>In LD day services we have already seen a change in demand, with most young people leaving transition and taking up community activities supported by Direct Payments. The remaining cohort are young people with additional needs such as challenging behaviour or complex care needs. This is a continuing trend. Based on recent experience older people are less likely to choose to attend a day centre.</i>	<i>The trend for local authorities across London and further afield is to move towards individual support for ASC customers, using Direct Payments to enable people to choose their own care and support. The organised activities which are in place are often commissioned from voluntary sector partners and are based in local community settings.</i>	<i>Direct Provision aims to provide good quality services to local people which are relevant and best suited to their needs, and to provide these services in a way which is cost effective and good value. All services interact in a positive way with their local communities</i>

Where are we now?

Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Learning Disability Day Services - move from High Path to Leyton Road.	The service successfully moved to a newly renovated Leyton Road and formally reopened in January 2019.	Close
Refine the supported living offer, ensuring more community presence.	All tenants in supported living have an individual support programme, reviewed annually which includes their chosen activities and what is required to facilitate this.	Close
Develop Mascot Telecare, using more assistive technology.	The service continues to keep abreast with developments in technology and prescribe equipment appropriately. Most customers are content with standard offering but more could be done to work with teams to encourage innovation.	Carry forward
Employment - work with wider range of customers.	The team works with referrals from the LD Team and also Job Centre Plus; these referrals are required to have an assessment by the LD Team. The range of customers is limited by the eligibility criteria but does cover a wide area of need.	Carry forward
Upgrade the Mascot Telecare Hub.	Installation of updated hub completed in August 2019.	Close

How will we get there?

Try to limit this to no more than around 5-7 key objectives. This section should be reviewed if there are any significant changes in direction during the year. Changes can be noted along with the reasons for and implications of the change. When you review this, look for opportunities, insights, or risks that have emerged.

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
<i>Review and remodel LD day services to fit with the offer being developed across ASC. Ensure that services meet the needs of younger people in accessing community, acquiring skills and moving towards employment and training. Staff will also need to support customers and carers who have accessed day centres for a long period. There is a need to achieve savings by 2022/23 in this area as part of the MTFS.</i>	Support our most vulnerable residents of all ages
	Bridge the gap and reduce inequalities
	Continuously improve

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
(LI) Review usage of centres	TBC	Does Not Apply	TBC	TBC	TBC	TBC		Annually	High
(LI) Work with Social work teams to assess each customer	TBC	Does Not Apply	TBC	TBC	TBC	TBC		Annually	High
(LI) Participate in LD Engagement	TBC	Does Not Apply	TBC	TBC	TBC	TBC		Quarterly	High
(LI) Work with Adult Learning and LD Team to revise employment pathway	TBC	Does Not Apply	TBC	TBC	TBC	TBC		Quarterly	High
(LI) Identify community settings suitable for use by individuals and small groups	TBC	Does Not Apply	TBC	TBC	TBC	TBC		Annually	Within a range
(S PI) No of Carers receiving services and/or information and advice	1893	Green	1,200	1250	1300	1500		Monthly	High
(S PI) % people receiving "long term" community services	75%	Green	72%	72%	72%	72%		Monthly	High
(S PI) No. of DTOCs - Adult Social Care delays only	Suspended due to Covid	Does Not Apply	Target yet to be confirmed by BCF	Target yet to be confirmed by BCF	Target yet to be confirmed by BCF	Target yet to be confirmed by BCF		Monthly	Low
(S PI) % of older people (65 and over) still at home 91 days after discharge from hospital into reablement/rehabilitation services	81.8%	Green	78.80%	TBC	TBC	TBC		Annually	High
(S PI) % of MAS COT calls answered in 60 seconds	96.92%	Red	97.50%	97.50%	97.50%	97.50%		Monthly	High
(S PI) Safeguarding Concerns to Enquiry Conversion Rate	46%	Green	31%	32%	33%	34%		Monthly	High

(LI) Proportion of adults with a learning disability known to us in paid employment	TBC	Does Not Apply	TBC	TBC	TBC	TBC		Monthly	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	
<i>LD Engagement programme</i>	Work with LD professionals, customers, carers, other agencies e.g. Merton Mencap to ascertain what this population wants to achieve					<i>Oct-19</i>		<i>Ongoing</i>	
<i>Day service review</i>	Reassess the needs of current customers, review current offer and the effects of COVID-19 on service delivery					<i>Nov-20</i>		<i>Apr-21</i>	
<i>Employment review</i>	Work with LD Team and Adult Learning to create a more streamlined pathway towards training and employment					<i>Nov-21</i>		<i>Initial project ending A</i>	
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
<i>Customers and families have been used to a traditional day centre offer and suggestions that this might change will cause anxiety and uncertainty.</i>					<i>During COVID a changed offer of support has been necessary and this will prove helpful when discussing alternatives. Increasingly younger people are showing a preference to access more individualised activities.</i>				
<i>COVID-19 has slowed the pace of engagement due to workload and has made meetings more difficult to facilitate. However the 'Big Conversation' project started in May 2021 and carried on through the summer. The results of this work are currently being evaluated.</i>					<i>A mixture of face to face meetings, workshops, video calls and a full survey, which attracted 380 responses took place between May and July. Survey results were published in September and work is now taking place with evaluating these results and beginning to plan for any change to</i>				
Impact on the customer/end user									
<i>Customers should end up with a personalised service with clear outcomes and opportunities to explore their community. People who need higher levels of care and support will continue to receive this in the</i>									
Partners / interdependencies									
<i>Direct Provision staff will work closely with professionals in the LD Team, Commissioning as well as colleagues in Adult Learning as well as those partners in the voluntary sector. Staff will work with customers and families to ensure a smooth transition to any new service which might be agreed. We will also work with E&R colleagues to agree a new transport offer (see below).</i>									
Service Objective 2					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the				
<i>Review Transport arrangements for Direct Provision customers, ensuring that each person has an individual travel plan most suitable for their needs and reducing the number of vehicles required, contributing to Merton's cleaner air agenda.</i>					Support our most vulnerable residents of all ages				
					Bridge the gap and reduce inequalities				
					Maintain a clean and safe environment				
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
(LI) Number of people using Merton Transport to attend day services	40 (COVID affected)	Not Yet Known	90	90	TBC	TBC	TBC	Monthly	High

(LI) Number of people taking part in travel training	2	Not Yet Known	3	12	TBC	TBC	TBC	Quarterly	High
(LI) Number of fleet vehicles in use	9	Not Yet Known	9	7	TBC	TBC	TBC	Annually	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date			Proposed end date
<i>Edge Transport Review</i>	Corporate review undertaken Nov 19 - March 2020. While not producing a wide ranging suite of ideas to enable ASC to take a different approach, it produced some helpful data. Colleagues across different departments are working through the response.								<i>E&R led project</i>
<i>Focused look at ASC transport/assisted travel needs</i>	Forecast future capacity, work with CSF to promote independent travel for young people in transition, look at current day service offer.					Oct-21			Jun-22
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
COVID-19 has disrupted normal service delivery, including transport requirements, and we are still not back to normal operation.					In recent years we have used fewer Merton buses with DP staff collecting customers from home. We would work to support those who can to travel more independently, leaving larger vehicles for those with highest needs. We will also seek where appropriate for people to attend venues near to their homes to reduce the length of journey times.				
Corporately there is a need to realign resources between departments to achieve greater flexibility					All departments need to review their activities and cost base going forward				
Impact on the customer/end user									
We would aim to have each person feeling confident that they have the correct travel support appropriate to their needs and suitable for their programme of activities.									
Partners / interdependencies									
We will work with E&R who currently provide vehicles and drivers. DP staff will work with the LD Team, Commissioning and potentially other partners in areas such as Travel training.									
Service Objective 3					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the				
<i>LD Accommodation - as part of LD offer review all residential and supported living units in Direct Provision ensuring that they are fit for purpose and meet the needs of residents. Work with LD Team to ensure that progression towards supported tenancies is achievable in all appropriate cases. Support residents, tenants and families through the review process and any move which might follow. Each site will need to ensure that current standards are maintained and where possible improved to meet the standards required by CQC - currently all services are rated as Good. Supported Living sites will need to continue to develop their offer to ensure that those tenants who can move to more independent properties can do so. The Gables offer in particular needs to be of a move through model.</i>					Support our most vulnerable residents of all ages				
					Bridge the gap and reduce inequalities				
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity

(LI) Work with LD Team to reassess each customer in Residential/Supported Living	8	Not Yet Known	20	25	TBC	TBC		Annually	High	
(LI) Number of people moved from home/residential to Supported Living	2	Not Yet Known	4	6	TBC	TBC		Quarterly	High	
(LI) Number of people moved from Supported Living to own full tenancy	1	Not Yet Known	2	2	TBC	TBC		Annually	Within a range	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description					Proposed start date			Proposed end date	
<i>Learning Disability Offer</i>	This workstream is looking at the whole range of services/activities linked to people with a learning disability and their families.					<i>Oct-19</i>			<i>Ongoing</i>	
<i>Housing Strategy</i>	A major piece of work looking at housing and accommodation requirements across Merton					<i>Oct-19</i>			<i>Ongoing</i>	
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
<i>There is a shortage of suitable property in Merton for developing sites, and a shortage of existing</i>					<i>The Housing Strategy is seeking to address the issue of identifying suitable sites for</i>					
Impact on the customer/end user										
<i>Residents and tenants would get the opportunity to live as independently as possible in good quality accommodation.</i>										
Partners / interdependencies										
<i>Merton's Housing services, Commissioning and Housing Associations are key partners.</i>										
Service Objective 4					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the					
<i>Review and develop Mascot Telecare; ensure that the service model is able to increase the number of self funding customers and to support colleagues across ASC in utilising the widest range of assistive technologies.</i>					Support our most vulnerable residents of all ages					
					Build resilient communities					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
(LI) Number of self funding Mascot customers	1433	Not Yet Known	1550	1600	1650	1700		Monthly	High	
(LI) Ensure Telecare is considered at every customer review and assessment	TBC	Not Yet Known	200	200	200	200		Quarterly	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description					Proposed start date			Proposed end date	

<i>Marketing exercise linked to Winter Warm programme</i>	Leaflets and letters included in Winter warm packages, Mascot staff involved in distributing Winter warm materials.						<i>Nov-21</i>	<i>Feb-22</i>	
<i>Review of Mascot operation</i>	Assess all roles within the staff team to evaluate capacity for marketing and promotion. Continue a wider marketing campaign – Work with community partners, teams across Adult Social Care and other Council departments and Communications to continuously promote Mascot						<i>Jan-22</i>	<i>Jun-22</i>	
<i>Continue a wider marketing campaign following the Winter exercise. Enable Mascot staff to actively attend events, forums once society resumes more social activities post COVID. Look at more</i>							<i>Sep-22</i>	<i>Ongoing</i>	
Potential barriers to achieving objective									
<i>Description of barrier</i>						<i>Mitigating Actions</i>			
<i>Mascot's service includes a full response to alerts and the staffing structure does not currently have much capacity for development work or wider engagement.</i>						<i>Review staff deployment; where possible support the service with staff from other DP teams.</i>			
<i>Previously staff attended community events to promote the Mascot service. During the pandemic these activities have stopped.</i>						<i>Find other forums for accessing community groups including via Zoom/Skype</i>			
Impact on the customer/end user									
<i>A wider take up of Telecare and other assistive technologies will enable more people to live at home for longer. A higher number of self funding customers will bring income for the Council.</i>									
Partners / interdependencies									
<i>Close working with teams across ASC including Commissioning. Liaison with voluntary sector groups to access potential customers.</i>									
Service Objective 5									
<i>Review the day service offer for older people with dementia - the number of people utilising day centres has steadily dropped in the past three years. Merton is reviewing care and support to people with dementia and their families and this work will be part of that work. Staff will continue their current role in carrying out home visits and maintaining communication with families.</i>						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the			
						Support our most vulnerable residents of all ages			
						Bridge the gap and reduce inequalities			
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
(LI) Number of people supported with alternative packages	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Quarterly	High
(LI) Link with other groups working towards	TBC	Not Yet	TBC	TBC	TBC	TBC		Quarterly	High

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)			
Project / activity name	Description	Proposed start date	Proposed end date
<i>Review/reassess all current customers with Long Term Team</i>	Ensure that each customer has a reassessment with need carried out by social work team with support of day service staff	<i>Oct-21</i>	<i>Ongoing</i>
<i>Work with Commissioning/Voluntary Sector to look at other support options</i>	With colleagues, look at best practice options to support this customer group, including outreach work, key work support to access mainstream activities, increasing the roles of Personal Assistants	<i>Jan-21</i>	<i>Ongoing</i>
Potential barriers to achieving objective			
<i>Description of barrier</i>		<i>Mitigating Actions</i>	
<i>Day centres have provided a secure 'respite' option for families who care for an older relative with dementia, although the numbers using centres have decreased. These families will want assurances that support is available.</i>		<i>Staff from centres have worked differently during COVID and have provided home visits and some social outings to some day service customers. This model can continue along with developing other interventions.</i>	
Impact on the customer/end user			
<i>Support and stimulation which is person based for the customer and assurances that support is still available for families. A good dementia care pathway will enable people to live at home for longer and avoid and/or delay families needing to consider residential care.</i>			
Partners / interdependencies			
<i>Close working with teams across ASC including Commissioning. Liaison with voluntary sector groups where appropriate to support customers.</i>			

People

Most Direct Provision staff have gained experience in working across the services and have proved to be able to work flexibly with a range of customers of varying needs. During the COVID-19 pandemic day service staff have worked to support colleagues in residential, supported living and Mascot. Staff have also adapted to deliver sessions via Skype and Zoom, carrying out home visits and accessing community spaces where possible. This flexibility will be required as services evolve. It is likely that the staff team will decrease in size over time. There will almost certainly be a changed work experience for many staff, working for example in the evenings and at weekends when customers want to socialise. Staff might also work from more than one base and spend more time on their own or with a smaller group of colleagues. Residential staff are faced with similar changes and if the number of homes reduces then the staff team will inevitably decrease.

Technology

Direct Provision staff mainly work directly with customers, apart from a small group of admin staff who have successfully worked from home during the COVID-19 pandemic. Care staff have learnt to carry out remote sessions with customers at home by using Skype/Zoom and similar. Most staff who need them have smart phones and we will where necessary equip staff with tablets to give further flexibility to work across various sites and from home. Mascot staff will need to continue to explore all assistive technologies to support a wider range of customers.

Service Improvement offer

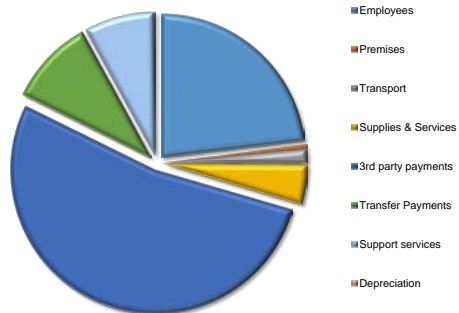
As noted we are reviewing all of our services to ensure they are relevant for the customers we support and for potential customers. In terms of service improvement Mascot Telecare was due to be the subject of a LGA Challenge which was deferred due to COVID-19. The issue with Mascot is more about the delivery model than the actual service; could it be outsourced, run as a Community Interest Company/Social Enterprise or similar? There are savings attached to both day services and residential which will result in a changed service offer. The aim is to ensure that less resources are spent on areas such as buildings and transport to ensure that more is left to focus on service delivery to customers.

Financial Summary

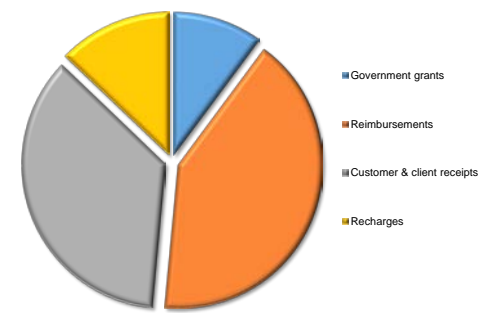
Adult Social Care future budget includes agreed savings for 2021/22 & 2022/2023. This will change once the MTF5 is finalised for 2021 onwards. The service will continue to have many challenges, such as demand pressures for services, the presentation of clients with more complex needs requiring services. Local provider markets remain volatile to change and increases in provider costs such as pay and pensions. There is also the uncertainty surrounding the future funding of social care, policy and potential for legislation on integration and the overall impact of the COVID-19 pandemic.

DEPARTMENTAL BUDGET AND RESOURCES								
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 PT	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	86,283	86,116	85,093	(813)	89,473	89,733	91,500	93,269
Employees	17,820	17,791	18,275	(976)	20,668	20,617	20,630	20,644
Premises	416	92	366	(99)	377	383	388	394
Transport	1,327	1,055	1,347	89	1,403	1,424	1,444	1,464
Supplies & Services	3,817	3,965	3,189	511	3,933	3,981	4,028	4,076
3rd party payments	45,896	46,723	46,317	(8)	47,231	47,273	47,951	48,629
Transfer Payments	10,195	9,514	8,429	(330)	8,691	8,885	9,889	10,892
Support services	6,669	6,833	7,027	-	7,027	7,027	7,027	7,027
Depreciation	143	143	143	-	143	143	143	143
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 PT	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	23,798	26,320	22,861	(1,094)	25,775	25,800	25,800	25,800
Government grants	1,280	3,714	607	3,572	2,590	2,590	2,590	2,590
Reimbursements	10,080	14,402	9,759	(2,229)	10,678	10,703	10,703	10,703
Customer & client receipts	9,197	5,059	9,185	(2,302)	9,197	9,197	9,197	9,197
Recharges	3,241	3,145	3,310	(135)	3,310	3,310	3,310	3,310
Reserves	-	-	-	-	-	-	-	-
Capital Funded	-	-	-	-	-	-	-	-
Council Funded Net Budget	62,485	59,796	62,232	(1,907)	63,698	63,933	65,700	67,469

2022/23 Expenditure



2022/23 Income



Summary of major budget etc. changes
2022/23

Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 PT	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Telehealth		-	30	-	-	-	-	0
	0	0	30	0	0	0	0	0

Growth for Concessionary fares decreases by £1.1m based on estimate cost for 2021/22. Includes new savings of £55k and previously agreed savings of £2.3m

2023/24

Growth for Concessionary fares decrease- £0.478k. Includes new savings agreed in 2020/21 of £1.359m

2024/25

Growth for Concessionary fares increase - £0.579m

2025/26

Service Plan for : Learning Disabilities Services

Service Manager: Gillian Moore

Cabinet Member: Rebecca Lanning

Overview of the service

Provide a brief overview of your service and the outcomes it seeks to provide for residents/service users, including any statutory duties that impacts on this

The Merton Community Learning Disabilities Team (CLDT) form one service area within Community and Housing directorate. The team sits in Adult Social Care and works with adults with a diagnosed learning disability (who may also have a diagnosis of Autism Spectrum Disorder). In exceptional circumstances the team works with adults who have Autism Spectrum Disorder without a Learning Disability when there are clearly identified Care Act eligible needs and the person is at current risk if they do not receive a service. The team is an integrated health and social care team consisting of a range of health staff and social workers. The team's primary purpose is to provide specialist health and social care services to people with learning disabilities and their carers/families. These are people who live in the community and whose lives and needs are so complex that universal services alone are unable to meet their needs. The CLDT is a fully inter-disciplinary team delivering on the following core functions as outlined below. The CLDT is constituted as three fully inter-disciplinary functional teams which include specialist health and social care professionals who have developed expertise in Mental Health and Challenging Behaviour, Complex Physical Health or Preparing for Adult (Transition) services. The team operate a Single Point of Access receiving referrals directly from a range of sources.

The team aim to build a culture based on strong community support service planned around people's environments and are focussed on person centred and strength based when looking at individual needs. The service embraces principles of values, rights, inclusion independence and choice and will work with all individuals who have learning disabilities and or autism equally despite any difficulties experienced in meeting their needs.

It is important that the activity in your service plan has a clear link to helping achieve the council's overall ambitions. Please consider these ambitions when developing your plan and ensure that activity and projects are matched against them:

- Support our most vulnerable residents of all ages
- Maintain a clean and safe environment
- Create a great place to grow up and live in
- Build resilient communities
- Bridge the gap and reduce inequalities
- Continuously improve

What do we need to do?

In developing your plan it is important to understand the wider context in which the service and the council operates. Please refer to Merton Data as a tool to help you understand the present and future demands on your service and the views and needs of its customers. This should be combined with local intelligence held by your service.

[Merton Data](#)

[The Merton Story](#)

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
This plan takes into consideration a series of engagement work that has been undertaken with people with Learning Disabilities (LD), their carers and families. Outcomes from previous engagement work	Data from 2017/18, records that the LD population in LBM stood at 708 (0.3%) this is data based on the numbers of people who were registered as having a LD by their GP. This was lower than England (0.5%), and London	National recovery plans related to the Covid-19 pandemic are unknown at this time. Government led inquiries and reflections on the response to Covid may result in	Our vision is to ensure that people with learning disabilities in Merton live ordinary lives. For those with LD this should translate to increased accessibility reduced stigma

James. Outcomes from previous engagement work carried out indicated that residents with LD want the LD team to work in a coordinated way. They would like the team to move away from traditional ways of working to a more co-ordinated approach that is focussed on the impact of life long conditions that many people are living with and that require ongoing care to cope with. Co-ordination with the concept of "I statements" should drive the manner in which professionals relate to people with Learning Disabilities.

Many people with LD live with complex life long conditions and they are often very dependent on others to meet their day to day needs. They remain one of the most marginalised groups in society and therefore it is always good practice when planning, developing and making changes to council services that affects them that an EIA is undertaken specifically for this population to understand the impact such activities are likely to have on them.

(0.4%) . The Merton story indicates that not all people with LD are registered by their GPs, the estimate suggest that there is approximately 3,900 people with LD in Merton, meaning only 18% are registered. The most recent population census (PANSI) estimates that there were 763 people with moderate and severe LD aged 18 to 64 listed as living in Merton in 2020. However, there are only 546 of them known to the Integrated Health and Social Care Community Team.

the response to covid may result in associated legislative and policy changes, any such change will need to be considered in our own plans and service configuration and will need to factor in the specific needs of residents with LD.

The Disability Discrimination Act promotes the rights of people with learning disabilities amongst other groups. The main aim is to ensure that people with LD are afforded the same rights as everyone else. Service configuration should factor in accessibility and reasonable adjustments in all aspects of life; including healthcare, job opportunities, the right to independent living and the right to access a range of community services. Transforming care and recent report from LeDer reviews have highlighted significant health and social inequalities for people with learning disabilities.

to increased accessibility, reduced stigma and cultural and social change to make appropriate adjustments to enable people with LD to live a full and meaningful life. This must include asking people with a learning disability to produce future service adjustments to make things better. Every effort must be made to ensure that they have a real say about what they want to see happening and changing. The Council must ensure that all people with LD, autism, or both and their families and carers are empowered to be partners in the care they receive.

The health component of the team are registered by CQC and therefore subject to review in accordance CQC KLOE. The team need to operate in a manner that will demonstrate compliance with the terms of their registration, to offer a more all round service.

Where are we now?

Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Prevention and Early Intervention	<p>The professional staff (Nurses, Psychologist, Occupational Therapist, Physiotherapist, Speech and Language Therapists, Social Workers and Assessment Officers) make up the CLDT service. Professionals are allocated to work with a range of service providers where the CLDT staff deliver link worker support to them. The purpose of the link worker offer is to promote positive access to universal services and to enable them to have effective responses when working with people with learning disabilities and Autism. This also stimulates the development of capabilities and confidence of people working in learning disabilities and mainstream services. The team undertake targeted work with individuals, carers and services enabling them to provide effective person-centered support in a timely manner, to delay the need for longer term multiple service responses. Link workers offer families/carers and other professional agencies/ teams support to promote independence, health and wellbeing. The staff deliver health and social care that is based on specialist knowledge and skills to meet the unique needs of people with LD and or Autism who use services or to people who support them.</p>	Carry forward
Function based holistic assessment. A strengths-based approach to care and support planning	<p>Responding positively and effectively to crisis presentations and urgent demands. Application of positive risk taking principles, seeing people's strengths as opposed to their deficits. The team will work to deliver person centred practice around the person and in the environment they are in. Focusing on joint working to ensure the best professional is working with the individual. Integrated assessments and care pathways requiring ongoing care co-ordination approach to avert different professionals from the same team going in on separate occasions. Staff must be trained and supported to deliver community based intensive support to people with LD.</p>	Carry forward

Positive behavioural support	Specialist direct clinical therapeutic interventions and support for people with complex behavioural and health support needs. Working to support individuals with learning disabilities and their families to manage behaviours that are challenging. Professionals provide specialist assessments/ diagnosis and different interventions and strategies to support individuals with their challenging behaviour, and or mental health, needs to manage independent community living. Work across the system to reduce the number of people living/ detained in mental health institutions. Establish a PBS framework based on intensive support. The intensive support must include intervention to those who are at risks of being involved in the criminal justice system.	Carry forward
Workforce development	Reviewing working practices to develop strength based practice across health and social care. The recently published capabilities framework is being reviewed and mapped against the workforce development plan.	Carry forward
Monitoring quality	The activities of the team are under monthly scrutiny by the quality assurance processes in Adult Social Care (ASC). The activities of the LD team are therefore subject to regular monitoring of quality. There will be a need to compile performance indicators of a good service, identifying areas for improvement, and a set of defined KPIs for health interventions and smart outcomes to measure / assess outcomes of the workforce interventions and to gauge the service user experience .	Carry forward
Transitions Model	Work with key stakeholders involved in transitioning young people between services and enable early planning for young people with EHC and complex needs to move between children and adult services. The Team will maintain a transitions register and design the operating model and work across the systems (CSF,CCG,CAMH, Education and AMH) to agree the pathways. Improve understanding and awareness of the needs of young people with disabilities and care leavers.	Carry forward

How will we get there?

Try to limit this to no more than around 5-7 key objectives. This section should be reviewed if there are any significant changes in direction during the year. Changes can be noted along with the reasons for and implications of the change. When you review this, look for opportunities, insights, or risks that have emerged.

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
Clearly define the offer for people with learning disabilities in Merton, starting with the way that the Integrated team work and ending with the offer of service provision that is available to meet their needs. This will also include a drive for access to universal services and a change in culture across the council and within partner services. A review of the existing offer of services such as day opportunities, employment and housing.	Support our most vulnerable residents of all ages
	Statutory requirement
	Continuously improve

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
(S PI) No of Carers receiving services and/or information and advice	1893	Green	1,200	1250	1300	1500		Monthly	High
(S PI) % people receiving "long term" community services	75%	Green	72%	72%	72%	72%		Monthly	High
(S PI) No. of DTOCs - Adult Social Care delays only	Suspended due to Covid	Does Not Apply	Target yet to be confirmed by BCF	Target yet to be confirmed by BCF	Target yet to be confirmed by BCF	Target yet to be confirmed by BCF		Monthly	Low
(S PI) % of older people (65 and over) still at home 91 days after discharge from hospital into reablement/rehabilitation services	81.8%	Green	78.80%	78.8% but TBC by BCF	78.8% but TBC by BCF	78.8% but TBC by BCF		Annually	High
(S PI) % of MAS COT calls answered in 60 seconds	96.92%	Red	97.50%	97.50%	97.50%	97.50%		Monthly	High
(S PI) Safeguarding Concerns to Enquiry Conversion Rate	46%	Green	31%	32%	33%	34%		Monthly	High
(LI) Proportion of adults with a learning disability known to us in paid employment	N/A	Does Not Apply	Suspended due to Covid	TBC	TBC	TBC		Monthly	High

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
Strengthen the Integration-	A clear care co-ordination framework is integral to making this work, with an underpinning principle being to adopt a single integrated health and social care process to deliver continuity of care for people with learning disabilities, people with Profound and multiple complex health needs and challenging behaviour, anyone requiring intervention and long-term support. Making use of research on the use of Positive Behavioural Support (PBS) models to respond to behaviours that challenge services and integrating this approach into the way the team operate. Supporting positive access to responses from mainstream services, health promotion and health facilitation.	Jan-21	May-22

Design the operating model for Transitions	Work with key stakeholders to agree a model for Transition. The team in its current format holds the register of all young people with EHC plans from Year 9 onwards and, when notified, other young people requiring transition support. a operating model (14-25, all age service or existing model) to be established					Oct-20	Mar-22		
Transitions Protocol	Work with Partners in CSF, CCG, schools and adult education to establish the referral and case management Pathways for preparation for adulthood, with particular attention paid to the PFA pathways as defined in the children and Families Act, Care Act and Send Guidance.					Oct-20	Mar-22		
Potential barriers to achieving objective									
Description of barrier				Mitigating Actions					
Staffing levels remaining consistent to be able to realise these objectives.				Agree the establishment for the service and ensuring that we secure permanency of the health and social care staff team					
Establishment of a workforce that is adequately equipped through training to ensure they have the required skills and techniques when responding to challenging cases.				source and work with the CCG to identify resources locally or across SWL to respond using PBS methods/approaches. Mandatory inductions and foundation training.					
Impact on the customer/end user									
CLDT will operate one integrated assessment process, one principal identified worker, one care plan and one review process including joint documentation, commonly agreed aligned eligibility criteria and integrated information systems. Having a clear PBS model will ensures staff have the skills to maintain people in the community and avoid hospitalisation and costly out of area placements. To manage a range of nursing needs, challenging behaviour needs and mental health needs of those with Learning disabilities. Application of the 5 good communications standards as identified by the Royal college of Speech and language therapist.									
Partners / interdependencies									
The health functions of the team need to be subject to CCG health delivery plans. Influencing commissioning intentions of health(CCG) especially in developing the PBS Framework locally.									
Service Objective 2				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Supported employment using strength based assessment approaches to identify the people with LD who are able and could benefit from being in employment. More people should feel confident to look for jobs and be supported to do so, commissioned service to assist people to facilitate the aspirations that people with LD have.				Create a great place to grow up and live in					
				Build resilient communities					
				Bridge the gap and reduce inequalities					
Indicator									
	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
(LI) Proportion of people with Learning disabilities and Autism in paid or voluntary employment	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Annually	Within a range
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	

<i>What people do, Day opportunities and employment options</i>	To work with key stakeholders (CSF, SEN, Schools, Adult education, employment service) to create employment pathways making use of vocational profiles- linked to OT specialist skilled assessments.						<i>Apr-21</i>	<i>Apr-23</i>	
<i>Where people live</i>	Where people live , stable and safe environments, enable people to live independently taking greater control over their lives and where they want to live. Reduce the numbers of people being placed out of area by ensure that housing is developed locally over the course of the next 5 years to ensure it meets the need of a range of people with Learning disabilities . Homes need to be available in settings close to public amenities close to transport links. The team will ensure that they are able to influence and provide information to support any development in housing options locally. Take an approach to housing that affords people their rights to be on a register for housing much like the rest of the population.						<i>Apr-21</i>	<i>Apr-24</i>	
<i>Moving to adulthood</i>	Transitioning between children and adult services, young people will be treated for this transition to adulthood ensuring that their voices is heard and incorporating their wishes.						<i>Apr-21</i>	<i>Mar-22</i>	
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
<i>Availability of a range of options for people in terms of where they receive their social and recreational activities where they work and live.</i>					<i>more community based options and less building based options.</i>				
<i>securing cross agency working can be a barrier if the work is not driven via a clear governance process with the respective agencies.</i>					<i>Regular interface and designing sessions with a range of key stakeholders , driven at senior levels in stakeholder agencies, carers and service users.</i>				
Impact on the customer/end user									
<i>This will address barriers to community access will assist with working with people to plan, and will ensure we assist them to develop and maintain their strengths, creating less dependency on services. alleviate or prevent the gaps in service delivery, remove personal risks to residents and mitigate risks to the council reputation and legal challenges. pole are engaged in meaningful activities that improves behavioural mental ill health and provide carers and families with much needed break from the demands of caring.</i>									
Partners / interdependencies									
<i>This wil need to be linked to the housing strategy, a seperate housing strategy or a chapter of the existing one based on capacity and demand modeling would be advisable. Local JSNA data to predict future demand and capacity planning. Consideration of partners longer term commissioning and planning intentions.</i>									
Service Objective 3					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				
Strengtening the teams operational practices to ensure a more coordinated approach is taken, to achieve the objective of greater access to universal services. Service user should therefore be offered one integrated assessment process with one main contact, one care and support plan and one review process, including combined health and social care workflow and documentation. This will ensure that we improve the service users experience work smartly and are more efficient.					Build resilient communities				
					Bridge the gap and reduce inequalities				
					Support our most vulnerable residents of all ages				
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
(LI) numbers of people with LD who have had a annual health check	n/a	Not Yet Known	TBC	TBC	TBC	TBC		Quarterly	High

(LI) Numbers of people with an integrated care and support plan	n/a	Not Yet Known	50%	75%	100%	100%		Monthly	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Annual health checks	Work with health partners to ensure that people with a learning disability get an annual health check						Commenced		Ongoing	
Project / activity 2										
Project / activity 3										
Potential barriers to achieving objective										
Description of barrier					Mitigating Actions					
We do not have local measure for assessing how the teams are performing, we need to set individual targets based on corporate measures.					Agree individual staff targets based on wider corporate measures .					
COVID-19 has disrupted routined health care such as annual health checks										
Impact on the customer/end user										
strengthening the teams operations will ensure that service user have a better experience of receiving social services and health interventions. Less need for complaints and preserve council reputation. reduction in risks from Judicial Reviews and other legal challenges.										
Partners / interdependencies										
Service Objective 4					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Determine the Future demand for housing accommodation for Adults with Learning disabilities in Merton, this will include working with the Housing department to influence the housing strategy ensuring that the strategy reflects the accommodation need of people with Learning Disabilities.					Create a great place to grow up and live in					
					Build resilient communities					
					Bridge the gap and reduce inequalities					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
(LI) Numbers of people who are living in a independent setting with their own tenancy	TBC	Not Yet Known	30%	TBC	TBC	TBC		Quarterly	High	
(LI) Numbers of people with LD who are on the housing register.	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Annually	Low	
(LI) Numbers of people Living in setting outside of Merton, who could otherwise be local	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Annually	Low	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	

Review existing service usage, availability and scope future demand as part of recovery and reset work programme.	Gather information on the wider population, living status, health needs including those groups with complex support needs, Autism Dementia, challenging behaviour, epilepsy, long-term and life long conditions. Review using demand and capacity framework to establish the existing housing options and determine what type of accommodation is needed for this group.					Mar-21	Apr-22		
Expand the Transitions Tracking align to performance workstreams/capacity, use data intelligence to determine future demand.	Review the future demand using data forum CSF to enable planning and service development.					Mar-21	Ongoing		
Potential barriers to achieving objective									
<i>Description of barrier</i>				<i>Mitigating Actions</i>					
scale and priority of capital and regeneration building programmes.				Develop the market through commissioning programmes					
Availability of data from Childrens Services				Improvements to systems, processes and data collection and monitoring					
The lack of appropriate and affordable housing in Merton				Working partners to identify sites/opportunities					
Impact on the customer/end user									
Availability of a range of accommodation options including expanding sheltered scheme for elderly people with learning disabilities.									
Partners / interdependencies									
Dependent upon movements in the council housing and building programmes locally. Influenced by the general housing market and provider development including the rental market locally .									
Service Objective 5									
				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Making safeguarding personal- ensure that at all times reasonable adjustments are made for people with learning disabilities to feel safe and where suspected abuse allegations are made for them to participate in the decision making and choice based support that they need to maintain their safety and contribute information that assist with enquiries.				Support our most vulnerable residents of all ages					
				Bridge the gap and reduce inequalities					
				Statutory requirement					
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
(LI) making safeguarding personal KPI	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Monthly	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	
Safeguarding audits	Ensuring that safeguarding audits take place. Ensuring that the voice of the person is heard					Commenced		Ongoing	
Project / activity 2									
Project / activity 3									
Potential barriers to achieving objective									
<i>Description of barrier</i>				<i>Mitigating Actions</i>					
Impact on the customer/end user									
Please highlight the anticipated impact on the customer/end user of carrying out the activity in your service plan									
Partners / interdependencies									
Highlight any interdependencies where other council services or partner organisations are linked to the delivery of this objective. If referring to another council service, please include the name of the team and department.									

Service Objective 6			Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions							
<i>Improve on the assessment and the services we offer to our carers</i>			Support our most vulnerable residents of all ages							
			Statutory requirement							
			Bridge the gap and reduce inequalities							
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
proportion of carers who have had an assessment (LI)	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Monthly	High	
numbers of people with LD who have had a annual health check (LI)	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Monthly	High	
Projects / key activities to support the objective <i>(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)</i>										
Project / activity name	Description						Proposed start date		Proposed end date	
Strengthening the integration of the MCLDT service	To ensure that health & social care team coordinate activities to enable service users to have a holistic and seamless experience						Mar-21		Sep-21	
Design a model for preparations for adult hood	To work across Childrens, Adults, Health & Education to design a preparation for adulthood operating model, including determination of resources required to manage transfer of cases between services/teams						Apr-20		Apr-22	
Potential barriers to achieving objective										
<i>Description of barrier</i>						<i>Mitigating Actions</i>				
<i>Commitment from all partners and resourcing of the team and model</i>						<i>Co- production across the system & senior management governance across all partners/agencies</i>				
Impact on the customer/end user										
<i>Seamless and avoidable cliffedge, Improvement in young peoples experience and early intervention and prevention. Co-production of the PFA/transitions plan and service model within Merton</i>										
Partners / interdependencies										
<i>Childrens Schools & Families, Health, Service Users, Carers, Voluntary Sectors, Trust</i>										
<i>Placing this work as priority for senior management across all agencies/partners</i>										

People

A recently published Capabilities Framework for professionals working with people with Learning Disabilities and Autism was launched in 2019. It is now mandatory for all staff to work in accordance with these guidelines and therefore training of all staff in the LD service and wider ASC will be required in 2021. The framework will help to ensure that staff working across health, social care and other sectors have the right training to understand the needs of autistic people and people with a learning disability, and make reasonable adjustments to support them. Training is a key element of improving statutory responses, especially to people who have multiple complex disabilities. The LD offer work stream project, that is focused on the integrated team, will undertake to identify training and upskill staff so that they meet the competencies, and professional standards, expected of them in all disciplines that form part of a comprehensive integrated community learning disability team. The team will need to be equipped to appropriately discharge statutory functions and empower other service areas to make reasonable adjustments and apply accessible standards.

Technology

The team will need the means to work remotely and in an agile manner. This will involve them having devices and mobile capabilities enabling them to work more effectively and smartly whilst on the go. Mosaic will need to be revised to ensure that the health staff are able to accurately record their activities. Existing Mosaic systems will need to be developed to link with Children's Schools and Families (CSF) to ensure sharing of key records of young people move between services. Through the departmental change programme, there will be a co-ordinated effort to make use of available technologies and technological advances that enhance the services delivered to residents. Use of assistive technology to support daily living and independence will be central to this.

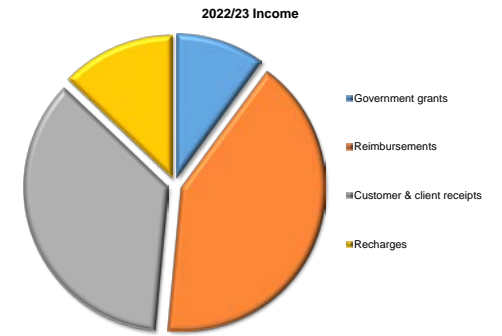
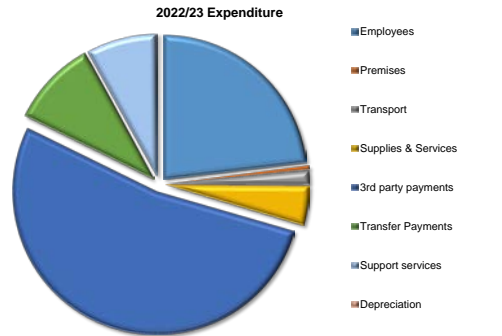
The team are currently working to establish new ways of working, this involves a strengthening of the front door service, and the duty processes. It also extends to establishing named worker roles and case co-ordination as new ways of working.

Financial Summary

Adult Social Care future budget includes agreed savings for 2021/22 & 2022/2023. This will change once the MTF5 is finalised for 2021 onwards. The service will continue to have many challenges, such as demand pressures for services, the presentation of clients with more complex needs requiring services. Local provider markets remain volatile to change and increases in provider costs such as pay and pensions. There is also the uncertainty surrounding the future funding of social care, policy and potential for legislation on integration and the overall impact of the COVID-19 pandemic.

DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	86,283	86,116	85,093	(913)	89,473	89,733	91,500	93,269
Employees	17,820	17,791	18,275	(475)	20,668	20,617	20,630	20,644
Premises	416	92	368	(495)	377	383	388	394
Transport	1,327	1,055	1,347	(89)	1,403	1,424	1,444	1,464
Supplies & Services	3,817	3,965	3,189	511	3,933	3,981	4,028	4,076
3rd party payments	45,896	46,723	46,317	(8)	47,231	47,273	47,951	48,629
Transfer Payments	10,195	9,514	8,429	(330)	8,691	8,885	9,889	10,892
Support services	6,669	6,833	7,027		7,027	7,027	7,027	7,027
Depreciation	143	143	143		143	143	143	143
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	23,798	26,320	22,861	(1,094)	25,775	25,800	25,800	25,800
Government grants	1,280	3,714	607	3,572	2,590	2,590	2,590	2,590
Reimbursements	10,080	14,402	9,759	(2,229)	10,678	10,703	10,703	10,703
Customer & client receipts	9,197	5,059	9,185	(2,302)	9,197	9,197	9,197	9,197
Recharges	3,241	3,146	3,310	(135)	3,310	3,310	3,310	3,310
Reserves	-	-	-	-	-	-	-	-
Capital Funded	-	-	-	-	-	-	-	-
Council Funded Net Budget	62,485	59,796	62,232	(1,907)	63,698	63,933	65,700	67,469



Summary of major budget etc. changes 2022/23

Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
	-	-	-	-	-	-	-	0
	0	0	0	0	0	0	0	0

Growth for Concessionary fares increase - £0.542m

2023/24

Growth for Concessionary fares increase - £0.992m

Included savings of £4.7m

2024/25

Growth for Concessionary fares increase - £1.4m.

2025/26

Adult Social Care - Operations

Service Manager: claire Migale

Cabinet Member: Cllr Rebecca Lanning

Overview of the service

Merton's Adult Social Care service Operations is sited in Community and Housing. Merton Adult Social Care / Operations comprises of various social care teams. The role of the Council's adult services is to provide advice and support to people aged 18 years and over who are in need of assistance due to:

- Illness
- Old age
- Disability and/ or
- At risk of losing their independence due to their physical or health conditions

We provide short term support - intensive support also known as reablement, available for a maximum of 6 weeks and longer term support - ongoing support to adults and older people with either long term health conditions, that impacts on their physical and mental wellbeing or people with physical disabilities, learning disabilities, or mental illnesses. The support we provide is informed by an Assessment of Need under The Care Act 2014 and could be for personal care, such as ensuring people have sufficient nutrition (eating), maintaining a habitable home, and ensuring good personal hygiene and help with getting dressed or for domestic routines such as shopping. Support from Adult social care can be provided through commissioned care services such as a carer providing support in the persons own home or support with moving to a care home. Support services we provide are usually paid for by either the private funds of the recipient of care or by us as the local Council.

We provide our statutory duties (adult social care) to the standards set out under The Care Act 2014. Along with the Care Act our main legislative framework, includes the Mental Capacity Act 2005, The Mental Health Act 2007 the Human Rights Act 1998 and Equalities Act 2010. This legislation sets out how people's care and support needs should be met.

We also have initiatives that ensure that we work in integrated ways with Health to ensure better care for everyone in hospital, in a care home or receiving care at home. Everyone being discharged following a stay in hospital is considered for our successful Reablement service. We have found that 70% of people who are provided with a period of reablement support in their own home (that enables them to regain their confidence and skills), no longer needs significant care and support from Adult Social Care.

In Merton Adult Social Care, we also provide information and advice to enable individuals, carers and families to take control of, and make well-informed choices about their care and support and how they fund it. Not only does information and advice help to promote people's wellbeing by increasing their ability to exercise choice and control, it is also a vital component of preventing or delaying people's need for care and support. We have partnered with local voluntary and community based Services with the aim of helping people to access information about local services and advice about ways to keep safe and well. This has worked particularly well during the COVID-19 pandemic.

Merton's ambitions

- Support our most vulnerable residents of all ages
- Maintain a clean and safe environment
- Create a great place to grow up and live in
- Build resilient communities
- Bridge the gap and reduce inequalities
- Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p>All ASC Customers eligible for a service, will receive person centred support. For all new ASC Customers who have been discharged from hospital we aim to have them return to their own homes and be supported to remain as independent as possible, this is under our "Home First" framework of delivering care and support and includes a period of reablement, ongoing assessment and review. All ASC customers in receipt of care and support are entitled to annual review carried out by the Social Work / Occupational Therapy teams, the care and support plan is also reviewed with the individual, their family /carers and updated accordingly.</p>	<p>The teams within ASC Operations are adapting the way in which we deliver services to meet demand and to meet the needs of local residents. We are moving to increased integrated working with Health colleagues to provide a rapid response in order to prevent people from being admitted to hospital. We have also found that whilst many older people enjoy attending lunch clubs and groups, many more people and their carers are realising the benefits of organising flexible support and respite for example, accessing community activities via Direct Payments. We shall be increasing the number of people being supported through Direct Payments. Significant improvements have been made to our safeguarding data quality and the data sub-group of the board continue to work on the quality and depth of multi-agency safeguarding information and intelligence. Equally, and set up as a consequence of the Hosoitla discharge model implemented through COVID-19, we have rich data in relation to our discharge activity across the established national pathway definitions.</p>	<p>The Health and Care Bill is currently passing through the houses of parliament and this will set the future direction of integration legislation and Local authorities. Locally this is interpreted by the SWL ICS Transitions team, with the Merton DASS part of that team. The new governance arrangements will be in place from April 2022 and Local Authorities, in particular Adult Social Care, along with Public Health are critical stakeholders in the delivery of integrated care at place. We have also received the Government White Paper on Adult Social Care reforms and this reflects implementation of a lot of Care part 2. Further responsibilities for self funders, establishing care accounts for all and lifetime caps on the individual costs contributed towards one's care. Having been implemented in April 2020, the national discharge policy and guidance and discharge to assess pathways will become a local policy and funding arrangement from April 2022. Merton is working as part of the SWL regional group to develop the local pathways, processes and funding mechanisms to continue to achieve good outcomes for hospital discharges. Across London and nationally are encouraged to promote and encourage person centred support for ASC customers using Direct Payments to enable</p>	<p>Working to be London's Best Council – Adult Social Care Operations aims to provide good quality services to local people to enable them to remain safely in their own homes for as long as possible with the right care and support. We aim to provide support to people to enable them to continue to care for their loved ones.</p> <p>We aim to provide this in a cost effective and ethical manner; in partnership with local residents, their families and carers. In an way that helps people to identify their individual strengths and support networks, in order to support them self or their loved ones and upholds their rights</p> <p>We aim to have a workforce that have the right tools and infrastructure to embrace agile working. We aim to have a range of ways of working, assisted by mobile technology, that promotes productivity and enables workers to have flexible choices about where and how they work, seamlessly mobile within the office environment and away from the office.</p>

customers, using Direct Payments to enable people to choose their own care and support. The organised activities which are in place are often commissioned from voluntary sector partners and are based in local community settings. Furthermore, during the pandemic and moving forward, key expectations of LAs and CCGs in their delivery of direct payments and personal health budgets, are to support people's continuing care and support needs and to manage and mitigate the impacts of COVID-19 via increasing the take up (and allowing the flexibility) of using direct payments.

Where are we now?

Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Reorganisation and alignment of the Adult Social Care access points and pathways within the context of the Care Act Principles of Wellbeing and Prevention and within the context of the principles of Merton Health and Care Together (the former being the main driver for better management of demand for more formal adult social care services). The latter has emphasis on whole system integrated working in order to provide ' <i>Right Care, Right Time, Right Place</i> ' .	In Progress: Following the consultation (delayed due to the COVID-19 Pandemic) transferring people into their expressed postshas been completed through 2021. There is residual recruitment required to fill all vacancies and this forms business as usual recruitment. Effective delivery of the agreed ASC pathways is now the focus of the next phase of the work in 2022. Progress has been made in implementing and embedding the national discharge to assess and hospital discharge policy framework ahead of these being determined locally at place, from April 2022	Carry forward
Embed a relationship based approach to working, based on identifying the individual person's strengths, developing their own network of support and helping them to identify their assets or developing community assets to meet the needs of individuals, families and carers.	In progress: Programme being developed with the SWL Teaching Partnership -draft programme is completed. Procuring and delivering training across the workforce. Developing the policy, procedural guidance and system changes required to support strengths based practice.	Carry forward
Refresh the skills and knowledge of all ASC staff in relation to the Care Act, strengths based practice and the wider legislative framework. In particular ensuring a personalised not punitive response to Safeguarding Adults and Making Safeguarding Personal. Develop a training and development plan in line with the needs of the department	Training needs analysis completed. Ongoing CPD programme has been developed with the SWL Teaching Partnership - draft programme is completed	Carry forward

Establishing a learning organisation approach.	Upskilling staff, continuous & ongoing learning and development, via a variety of means of learning opportunities and not just with standardised training.	Carry forward
Develop an online community directory and self assessment document	In Progress: - research underway to build the product.	Carry forward
Digital Transformation - Develop and streamline agile working opportunities for all service areas	In progress:- Mosac upgrade will be completed in Jan 2022. Further scoping can then take place to maximise the use of systems through remote and mobile working to increase opportunities for field based working, productivity and timeliness of outcomes for residents. Engaged in a SWL initiative in relation to tech enabled care, telecare & telehealth. Financial Assessment is the first Proof of Capability project	Carry forward
Increase the take up of Direct Payments, including accessing DP for one off bespoke equipment provision for younger people with sensory impairments and ability for the individual to "top up" the DP in order to procure enhanced / personalised technological equipment.	In progress: Targeted DP take up with individuals and carers	Carry forward
Update the offer of Assistive Technology with an increased catalogue containing products found on the general market -	In Progress to offer technological support for people who may have dementia with equipment that is on the open market or via Mascot telecare. Customers appear to be content with standard offering however, a wider offer would be more responsive to future recipients. Need to explore opportunities to exploit mainstream assistive and smart technology to support independent living. i.e. Internet of Things approach. To work with health partners on implementing telehealth.	Carry forward

Investing in staff skills; Increase resource and capacity for undertaking specialist business support roles e.g. a Safeguarding minute taker and training in Safeguarding Minute taking in order to meet our statutory duties	In progress: Working with L& D	Carry forward
Responding to upcoming demands.	With regard to COVID-19 Pandemic, Initiatives and pilots are underway to be reviewed in March 2021 (TADD and D2A, Rapid Response and community champions) In particular for people from under represented groups.	Carry forward

How will we get there?									
Service Objective 1				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Improve quality of Practice with timely interventions. Develop and embed a quality assurance framework.				Continuously improve					
				Bridge the gap and reduce inequalities					
				Statutory requirement					
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
(S PI) No of Carers receiving services and/or information and advice	1893	Green	1,200	1,250	1,300	1,500		Monthly	High
(S PI) % people receiving "long term" community services	75%	Green	72%	72%	72%	72%		Monthly	High
(S PI) No. of DTOCs - Adult Social Care delays only	suspended due to COVID19	Does Not Apply	suspended due to COVID19	TBC by NHSE	TBC by NHSE	TBC by NHSE		Annually	Low
(S PI) % of older people (65 and over) still at home 91 days after discharge from hospital into reablement/rehabilitation services	TBC	Not Yet Known	78.80%	78.8% but TBC by BCF	78.8% but TBC by BCF	78.8% but TBC by BCF		Annually	High
(LI) Timely Intervention -Completion time from allocation to completed assessment.	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Quarterly	Within a range
(LI) Increase % the take up of direct payments and personalised support -(benchmark against London to agree % increase)	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Monthly	High
(S PI) Safeguarding Concerns to Enquiry Conversion Rate	46%	Green	31%	32%	33%	34%		Monthly	High
(LI) Broaden the offer of provision of community resources, support, advice and guidance in the voluntary sector to meet current demand	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Annually	High
(LI) Increased improvement on the quality of our intervention - via increased number of compliments recorded which indicate customer satisfaction	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Monthly	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Timely, good quality intervention	Embed within the QA Framework, the recommended completion time from allocation to completed assessment as a measureable output.						Jan-21	ongoing	

<i>Voluntary Sector Offer</i>	Meeting with voluntary sector commissioner to review the offer of resource / provision in the voluntary sector - especially around supporting individuals with easing isolation and safely increasing social interaction						<i>Dec-20</i>	<i>ongoing</i>	
<i>Increased usage of direct payments and increased flexible support for carers</i>	No of Carers receiving services and/or information and advice and increased take up of Direct payments						<i>Jan-21</i>	<i>ongoing</i>	
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
Impact on the customer/end user									
<i>The customer should receive a good quality, improved service. One that meets their identified needs. Customer may also feel well informed, supported and safeguarded against further incidences of abuse or harm. Thus increasing confidence in the Council ASC Department.</i>									
Partners / interdependencies									
<i>Working jointly with Business Intelligence.</i>									
Service Objective 2						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions			
Increase the take up of Direct Payments for adults and older people						Support our most vulnerable residents of all ages			
						Bridge the gap and reduce inequalities			
						Statutory requirement			
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
(LI) Improved experience of adults customer journey for the individual - Ensure the right intervention, carried out by the right team, at the right time.	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Quarterly	High
(LI) Improved Quality Assurance - increased quality of work ensuring person centered and strengths based	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Quarterly	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
<i>Review take up of Direct Payments</i>	<i>Engage with customers, carers, other agencies eg to ascertain the type of support our citizens want</i>						<i>Dec-20</i>	<i>Ongoing</i>	
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
<i>Currently Direct Payments are delivered via commissioned agencies, this can impact of the flexible and person centered / creative approach to service delivery.</i>						<i>During COVID government guidance has been disseminated highlighting how to allow the flexible use of Direct Payments to support people during the COVID 19 pandemic. Guidance should be considered and followed. https://www.gov.uk/government/publications/coronavirus-covid-19-guidance-for-people-receiving-direct-payments/coronavirus-covid-19-guidance-for-people-receiving-direct-payments</i>			
<i>Currently unsure of the capability to develop a PA directory whereby individuals can safely recruit PA's with the right values and cultural matching. Potential workforce may be impacted / diminished due to the effects of Brexit and COVID19</i>						<i>A mixture of face to face meetings, questionnaires and video conferences will enable engagement to continue.</i>			

Impact on the customer/end user										
<i>Customers should have a person centered service with clear outcomes and opportunities to explore their community. People who need higher levels of care and support will continue to receive this in the most appropriate setting for their needs.</i>										
Partners / interdependencies										
<i>Work closely with Business Intelligence Team, Direct Payment Team as well as colleagues in health with regard to personal health budgets as well as partners in the voluntary sector (Carers center).</i>										
Service Objective 3					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
<i>Increased integrated working with Health Colleagues</i>					Support our most vulnerable residents of all ages					
					Bridge the gap and reduce inequalities					
					Statutory requirement					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
(L) Maintain 7 day working arrangements until spring 2021 to reduce the number of delays attributed to social care.	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Quarterly	High	
(L) Develop pathway to reduce hospital admissions	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Quarterly	High	
(L) Maintain Reablement offer and pathway	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Quarterly	Within a range	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Home First Project</i>	<i>Project focusing supporting people to return to their own homes, rather than residential or nursing care</i>						<i>Sep-19</i>		<i>Ongoing</i>	
<i>Blue Bird Project</i>	<i>Project with Health colleagues to prevent admission into hospital</i>						<i>Aug-20</i>		<i>Ongoing</i>	
<i>Increase Reablement Capacity</i>	<i>Evaluate the Team Manager Role and bring in line with other ASC Team Managers to provide improved service structure. Resulting in a more efficient run service, leading to better outcomes for people who make use of the service.</i>						<i>Feb-21</i>		<i>Ongoing</i>	
Potential barriers to achieving objective										
Description of barrier					Mitigating Actions					
<i>Organisational barriers and challenges between Health and Social Care Colleagues. Funding constraints hinder investment into the new services.</i>					<i>Following re-evaluation, funding the uplift to the Reablement Team Manager role.</i>					
Impact on the customer/end user										
<i>Customers are able to remain in their own homes for as long as possible, thus reducing the demand on residential and nursing care, ensuring availability for those who are most vulnerable.</i>										
Partners / interdependencies										
Service Objective 4					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					

<i>Increase take up of flexible and person centered support for carers particularly those from BAME Communities</i>				Support our most vulnerable residents of all ages						
				Bridge the gap and reduce inequalities						
				Statutory requirement						
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
(LI) Increased number of carers making / receiving contact and taking up support (at different levels)	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Monthly	High	
(LI) Increased number of carers accessing Direct Payments	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Monthly	High	
(LI) Increased number of carers from BAME Communities accessing support	TBC	Not Yet Known	TBC	TBC	TBC	TBC		Monthly	Within a range	
Projects / key activities to support the objective <i>(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)</i>										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Review of Carers Strategy</i>	Ensure carers strategy contains meeting the needs of carers from BAME Communities						<i>Dec-20</i>		<i>Jul-27</i>	
<i>Review support for individuals and carers from BAME Communities</i>	Review community assets and the offer for carers, for effectiveness, accessibility, meets the needs of the people and cost effective.						<i>Mar-21</i>		<i>Ongoing</i>	
<i>Review Direct Payment PA database</i>	Review of the Database in order to target and increase the numbers of PA's from all cultural backgrounds, in order to meet the needs of all communities. ie cultural matching.						<i>Jan-21</i>		<i>ongoing</i>	
<i>Improve & promote the Direct Payments service within local communities, also targetting BAME communities</i>	Focused publicity campaign						<i>Sep-21</i>		<i>ongoing</i>	
Potential barriers to achieving objective										
<i>Description of barrier</i>						<i>Mitigating Actions</i>				
<i>PA database may require improvement/development</i>						<i>Improve/develop systems</i>				
Impact on the customer/end user										
<i>Provide more diverse and representative personal assistance, and imporvement to social capital and more diverse recruitment.</i>										
Partners / interdependencies										
<i>Local & voluntary partners</i>										

People

Most Direct Provision staff have gained experience in working across the services and have proved to be able to work flexibly with a range of customers of varying needs. During COVID we have been able to have in place flexible working with staff, not only from venues (home and office based) but also across teams. We have been able to respond to demand by workers being placed where they are most needed, for example hospital to home team or safeguarding. Having a flexible approach has meant that service delivery has evolved, for example 7 day working for hospital discharges.

Reablement - most staff are office based due to the system and process including the demand and unpredictability of working during the pandemic. Staff mostly come into the office on allocated days to undertake administrative duties. Going forward, we aim to provide smarter working methods for all staff including the ability to update electronic case recordings " on the go."

Technology

Staff work directly with customers to undertake assessment of need, prescribe equipment, create support plans and carry out reviews. Teams have successfully worked on a rota basis either from home and in the office during the pandemic. Social Workers, Occupational Therapists and Social Care workers are able to undertake assessments remotely with customers, using variety of online platforms such as Skype or Zoom. Workers were provided with smart phones and or laptops, depending on their role and needs, to give further flexibility to work agilely across various sites and from home. An increase in PI terminals in the office is necessary to ensure desktop usage and to compliment existing laptops. In particular for reablement, as due to the nature of their roles, workers return to the office to undertake administrative tasks.

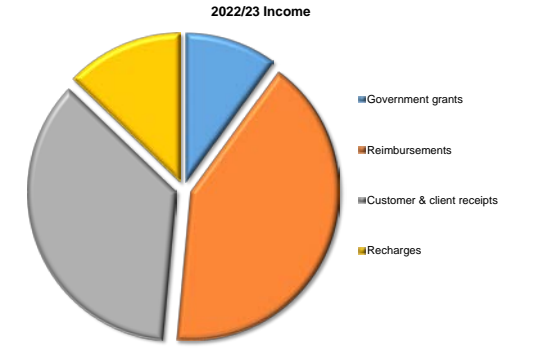
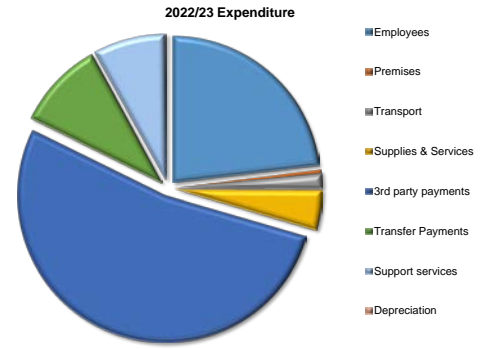
Workers

As previously set out, in terms of service improvement we are in the midst of a reorganisation this was halted due to the COVID 19 pandemic. This is due to restart and will now incorporate staff working from home to ensure they have the right tools and support to do the job well. Paying particular consideration to work / life balance and managing overall staff wellbeing. Regular online meetings and platforms such as WhatsApp groups have been well utilised to provide peer support and in order to maintain staff wellbeing and to ensure timely information is disseminated. During the height of the pandemic, managers and workers reported that they benefited from daily online meetings to share information.

Financial Summary

Adult Social Care future budget includes agreed savings for 2021/22 & 2022/2023. This will change once the MTFs is finalised for 2021 onwards. The service will continue to have many challenges, such as demand pressures for services, the presentation of clients with more complex needs requiring services. Local provider markets remain volatile to change and increases in provider costs such as pay and pensions. There is also the uncertainty surrounding the future funding of social care, policy and potential for legislation on integration and the overall impact of the COVID-19 pandemic.

DEPARTMENTAL BUDGET AND RESOURCES								
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	86,283	86,116	85,093	(813)	89,473	89,733	91,500	93,269
Employees	17,820	17,791	18,275	(976)	20,668	20,617	20,630	20,644
Premises	416	92	366	(69)	377	383	388	394
Transport	1,327	1,065	1,347	89	1,403	1,424	1,444	1,464
Supplies & Services	3,817	3,965	3,189	511	3,933	3,981	4,028	4,076
3rd party payments	45,896	46,723	46,317	(8)	47,231	47,273	47,951	48,629
Transfer Payments	10,195	9,514	8,429	(330)	8,691	8,885	9,889	10,892
Support services	6,669	6,833	7,027	-	7,027	7,027	7,027	7,027
Depreciation	143	143	143	-	143	143	143	143
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	23,798	26,320	22,861	(1,094)	25,775	25,800	25,800	25,800
Government grants	1,280	3,714	607	3,572	2,590	2,590	2,590	2,590
Reimbursements	10,080	14,402	9,759	(2,229)	10,678	10,703	10,703	10,703
Customer & client receipts	9,197	5,059	9,185	(2,302)	9,197	9,197	9,197	9,197
Recharges	3,241	3,145	3,310	(135)	3,310	3,310	3,310	3,310
Reserves	-	-	-	-	-	-	-	-
Capital Funded	-	-	-	-	-	-	-	-
Council Funded Net Budget	62,485	59,796	62,232	(1,907)	63,698	63,933	65,700	67,469



Summary of major budget etc. changes

Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Telehealth		-	15	-	15	-	-	0
	0	0	15	0	15	0	0	0

2022/23

2023/24

2024/25

2025/26

Service Plan for : Housing Needs and Enabling

Service Manager: *Elliot Brunton*

Cabinet Member: *Councillor Martin Whelton*

Overview of the service

To fulfil statutory housing functions including the prevention and relief of homelessness and the enforcement and regulation of the private rented sector.
To plan services in response to changes in national policies and in the housing market, and to develop innovative projects or models of delivery that maximise the use of resources and deliver services that minimise costs to the Council.

The purpose of this service is to:

- Prevent and relieve homelessness in accordance with statutory housing law, including the reduction of rough sleeping in the borough
- Provide homes to people in housing need
- Formulate and deliver statutory homelessness and rough sleeper strategy for the borough
- Maintain the housing register and choice based lettings process and nominate households to vacant housing association homes
- Maximise supply of homes with private landlords
- Provide care and housing support to vulnerable adults via Shared Lives
- Carry out a statutory duty to enforce Environmental Health (Housing) legislation
- Provide mandatory grant assistance for improvements and adaptations
- Commission and monitor Housing Related and Floating support
- Relationship management between the council and stock transfer housing associations

Merton's ambitions

Support our most vulnerable residents of all ages
Maintain a clean and safe environment
Create a great place to grow up and live in
Build resilient communities
Bridge the gap and reduce inequalities
Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p><i>Our customers are residents of the borough who are:</i></p> <ul style="list-style-type: none"> • <i>Threatened with a homeless episode</i> • <i>Are homeless</i> 	<p><i>Rough sleeping remains an issue post lockdown and during the pandemic and the team continues to see new reports of rough sleepers which require support and assistance.</i></p>	<p><i>The service is subject to regular and unprecedented changes to Housing law and practice.</i></p>	<ul style="list-style-type: none"> • <i>C&H Recovery and reset programme</i> • <i>Increased Digital working-- new housing software system, digital scanning and archiving</i> • <i>Working towards elimination Rough</i>

- Are the Council's Housing register and waiting for a social housing tenancy
- Households in temporary accommodation
- Facing harassment or illegal eviction
- Are experiencing disrepair in their homes (this extends to the private sector and housing association tenants)
- Experiencing insanitary conditions
- Require major adaptations to their home as part of a disabled facilities grant
- Are rough sleeping, or at risk of rough sleeping
- In need of care and support in shared lives accommodation
- Gypsies and travellers in need of housing assessment or a permanent pitch
- Landlords with properties in the borough

Whilst there was a small but temporary increase in private sector accommodation in the pandemic due to lack of demand due to people temporarily leaving London, this has now returned to pre-pandemic levels of activity.

Whilst additional cases were admitted to temporary accommodation under the 'everybody in' principle, this took place against the backdrop of a fall in family admissions due to the moratorium on private sector evictions. This meant there was not a drastic increase in the overall number of cases.

The end of the moratorium on evictions has not seen the dramatic increase in the use of temporary accommodation as may have been expected. This may be due to pragmatic decision on the part of landlords and tenants, but it is too early to say whether or not there are cases still waiting to be processed through the court system.

As a final point a Homelessness and Housing Need is not just driven by people's behaviours but socio-economic factors which at the present time are largely unknown.

There were changes to s21 notice periods during the pandemic and whilst these have now returned to pre-pandemic notice periods we should be mindful that there could be further changes depending on how the pandemic.

It is clear that the pandemic has led higher demand for accommodation and support, particularly for those groups who are the most vulnerable members of our society and has had an effect of the supply of housing. It is also the case that the housing service through changes to national policy has been supporting NRTPF cases which ordinarily would not be eligible for support. Housing enforcement law continues to be relatively unchanged at this time, however, given that the private sector will increasingly be the main form of supply for our residents and for this service will increase.

Through the 'Everyone In' programme during the first lock down, we have placed 150 rough sleepers into temporary accommodation to date.

Sleeping in Merton.

- Maintain position of having lowest numbers of homeless households in London
- Tackle poor housing condition through enforcement, including prosecutions and Civil Penalties
- Build upon Shared Lives to provide accommodation and support to a wider cohort of vulnerable individuals - including young people
- Continue to deliver housing support and support services and protecting vulnerable people in their homes.
- Use service insight to inform Housing Strategy by Future Merton

Where are we now?

Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Private Sector Housing Enforcement: Develop and implement a range of Housing Enforcement measures to protect private tenants in Merton, including exploring the introduction of selective licencing/additional licencing	Ongoing service delivery. 3 prosecutions and 1x CPN.	Carry forward
Rough Sleeper initiatives: Deliver a range of Rough Sleeper initiatives so as to halve the number of rough sleepers in Merton by 2022.	Ongoing service delivery, supported by a range of grants to the value of £1.5m to support this work.	Carry forward
Public Protection Technology Upgrade: Work with IT / E&R on re-procurement / replacement of M3PP, cloud hosting and subsequent upgrade of M3PP to Assure.	This is led by the Business System Manager in IT BST. Minimal Housing involvement in 2020/21. Project ongoing.	Carry forward
Housing IT software re-procurement: Re-procure all IT Software solutions for Housing Needs (Homelessness, Temporary Accommodation & Rent Accounts, Housing Register and Choice Based Lettings).	Procurement process completed, supplier selected. Currently implementing. core application delivered by Qtr. 4 2020/21. Additional features being delivered throughout 2021/22. 2022/23 likely to see a series of system change requests. Project ongoing.	Carry forward
Homelessness Strategy Implementation: Work with stakeholders to deliver the strategy and monitor the completion of the actions arising from the Homelessness Strategy.	Draft Strategy being revised to reflect current operating environment. The final draft will be subject to funding stream and sign off through the political process.	Carry forward

How will we get there?

Service Objective 1 Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions

Prevent homelessness in the borough Support our most vulnerable residents of all ages
Statutory requirement

Performance Measures

Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of homelessness preventions annually	455	Green	450	450	450	450	450	Monthly	High
No. of households in temporary accommodation (monthly average)	204.4	Red	240	240	240	240	240	Monthly	Low
Average length of stay (nights) of Families in non-self-contained B&B	13.9	Green	21 nights	21 nights	21 nights	21 nights	21 nights	Quarterly	Low

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
<i>New Housing Software utilisation</i>	Embed use of new Housing "CRM" system, including processes and customer engagement, includes Business Support process work	2020/21	<i>ongoing</i>
<i>Housing Options Toolkit</i>	Staff guidance on best practice implementing our homeless duties. Kept under review.	2020/21	<i>ongoing</i>

Potential barriers to achieving objective

Description of barrier	Mitigating Actions
<i>Evolving demand for services during C19 pandemic</i>	<i>Maximise supply from all sources</i>
<i>Government guidance changes rapidly in response to Covid 19</i>	<i>Maintain regular contact with MHCLG and London Councils Directors group</i>
<i>Loss of Homelessness grants</i>	<i>Maintain regular contact with MHCLG to ensure they understand importance</i>

Impact on the customer/end user

Prevention of homelessness

Partners / interdependencies

Will require support of landlords and Government support and grant funding

Service Objective 2 Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions

Deliver on Housing Enforcement Policy Statutory requirement
Support our most vulnerable residents of all ages
Bridge the gap and reduce inequalities

Performance Measures

Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of enforcement/improvement notices issued annually	128	Green	100	100	100	100	100	Quarterly	High

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No. of cases resulting in a Prosecution or Civil Penalty Notice of a Landlord	0	Green	4	4	4	4	4	Annually	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Issue Civil Penalty Notices/ Prosecutions	Continue to build skills in regards to successful prosecutions / CPNs						2019/20		ongoing	
explore the introduction of selective/additional licencing	As per agreed project plan						21/22		2023	
Potential barriers to achieving objective										
<i>Description of barrier</i>						<i>Mitigating Actions</i>				
Disruption to enforcement due to Covid 19						PPE and risk assessments				
Polical support/data supporting the introduction of selective licencing						none				
Impact on the customer/end user										
Delays to problem resolution.										
Partners / interdependencies										
Legal Services, Planning, Landlords										
Service Objective 3					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Eliminate Rough sleeping by 2025 as per GLA strategy					Support our most vulnerable residents of all ages					
					Statutory requirement					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
To halve the number of Rough Sleepers by 2022, and reduce to zero by 2025	13	Green	14	10	7	3	0	Annually	Low	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
RS pathway to settled accommodation	Continue to work with rough sleepers and partners to ensure rough sleepers do not return to the streets and their tenancies are sustained. This includes health initiatives , debt management and mediation.						Already started		subject to ongoing funding	
RS access to training and employment	Assist clients to become more independent by assisting them to access training and employment						Already started		subject to ongoing funding	
Potential barriers to achieving objective										
<i>Description of barrier</i>						<i>Mitigating Actions</i>				
Entrenched clients either refusing to go into accommodation, or abandon accommodation or get evicted						Seek continuation funding for named entrenched clients e.g. through RSI 2022/25 funding, and work with partner agencies to provide bespoke support for these clients				
Impact on the customer/end user										
Sustainable housing options for rough sleepers including entrenched ones, help clients move off the streets and re-build their lives, and help reduce anti-social behaviour, unsightly encampments thus										
Partners / interdependencies										
We rely on intelligence provided by our partner agencies to help locate rough sleepers and to help persuade them to go into accommodation. Partner agencies include the Police, Clarion Housing, Faith in										

Action, Merton Street Pastors, YMCA, Love Wimbledon and council teams such as Public Spaces, Parks, Environmental Patrol etc.

Service Objective 4 Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions

Maximise Housing supply for residents in housing needs Support our most vulnerable residents of all ages
Create a great place to grow up and live in

Performance Measures

Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Successful Nominations to HA homes (let)	Not reported corporately	Does Not Apply	250	225	225	225	225	Annually	High
Rent Deposit / Private Sector lettings	Not reported corporately	Does Not Apply	40	150	150	150	150	Annually	High

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
Greater collaboration with Future Merton	Maximise affordable housing in the borough	ongoing	ongoing
Monitor Capital Letters Performance	monitor delivery of private sectors in line with agreed targets	2020/21	ongoing
Empty Homes	Consider pros and cons of implementing an Empty Homes Strategy	2020/21	2022/23

Potential barriers to achieving objective

Description of barrier	Mitigating Actions
RPs compliance with nomination agreement	enforce nominations rights

Impact on the customer/end user

Reduced periods in Temporary Accommodation and improved suitability of properties

Partners / interdependencies

Future Merton, GLA, Housing Associations

Service Objective 5 Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions

Diversify Shared Lives portfolio to include young people Support our most vulnerable residents of all ages
Continuously improve

Performance Measures

Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Go Live with portfolio for young people	Not reported corporately	Does Not Apply	n/a	Plan complete	Plan complete				

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
Housing Opportunities for Young People	monitor use of the scheme for young people	2020/21	ongoing

Potential barriers to achieving objective

Description of barrier	Mitigating Actions
Lack of Shared Lives carers	Maintain good relationship with existing carers and advertise for others

Impact on the customer/end user

Increased life chances for young people

Partners / interdependencies

Shared Lives Plus, private sector, Legal services, Children's Schools & Families

People

- 31 staff (23 permanent and 8 agency staff)
- 2.31 days sickness per employee (rolling period) Permanent staff
- BAME staff – 35% non BAME 56% not known 9% (permanent)
- Age Range of Employees (permanent)
30 & Under - 8.70%, 40 - 50 - 17.39%, 50 - 60 - 52.2%, Over 60 - 21.7%

The Head of Housing is retiring and and interim Head of Housing has been appointed for 6 months. This may impact future workforce and team planning.

Workforce planning – the department has an ageing workforce, with many long serving members of staff, which brings a risk that when key staff leave, it may be difficult to fill their roles. Succession planning is vital to ensure we are confident that plans are in place to grow our own, through development, mentoring, apprentices, training etc. or recruiting pro-actively to ensure key roles. 5 posts are funded via MHCLG grants, which are subject to review and renewal. Currently some of these grants are single year and therefore forward planning , assessing delivery options and service continuity planning is restricted.

Recruitment and retention – It is becoming increasingly difficult to recruit to Housing Options Advisor posts and Housing Enforcement / Environmental Health officers.

Morale, health and wellbeing – Sickness levels in the department are significantly below the corporates target of 7 days per FTE. Public Health are responsible for rolling out the Healthy Workplace programme throughout the Council. Regular updates on action arising from the staff survey are provided to staff through annual staff seminar, Director Briefings and divisional meeting.

Leadership – The leadership of the department is key to the successful implementation of this plan.

The key issues faced include:

- Specialist / hard to recruit posts
- Discuss, engage and consult on all aspects of service delivery and planning
- Managing sickness levels
- Ensuring all staff have the right IT skills to utilise our IT fully and to support of flexible and home working.

Technology

The Housing Needs service has completed the procurement of a new hosted Housing System and this is being delivered by Home Connections and is ongoing. This has the full support of IT. The new system combines three systems into one - incorporating the Home Connections Choice Based Lettings and Hope systems and the Housing Register and Temporary Accommodation functionality from Capita Housing. This has been on the IT implementation plan.

Our Housing Enforcement team use M3PP. The lead department for this is E&R Shared Regulatory Services. The system moved to a cloud-based environment last year, provided by Northgate. The system will upgrade to the latest iteration, Assure.

housing documents have been scanned and will be placed onto share point. Post scanning to be implemented.. The service will contribute its priorities for mobile and remote working, that enables greater efficiency in completion of processes and procedures.

Service improvement

The Housing Team is currently in the midst of the largest ever change to work processes and procedures. We have worked with the Business Improvement Team in order to map our processes for the existing workflow. Will continue to engage and seek their support to process map how we work with the new technology, with regards to the both Home Connections and Sharepoint.

The new Home Connections system will provide an improved customer experience by the use of on-line forms and a customer portal. Additionally, the implementation of this new technology should bring improved service delivery and benefit customers and staff.

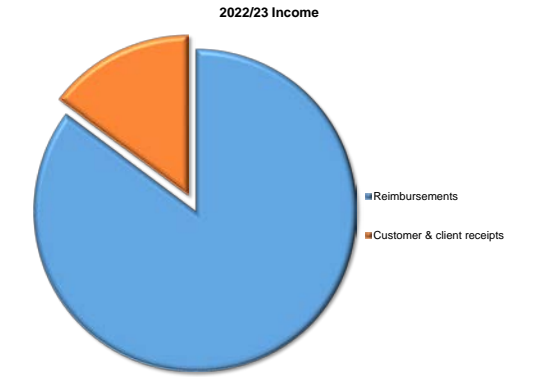
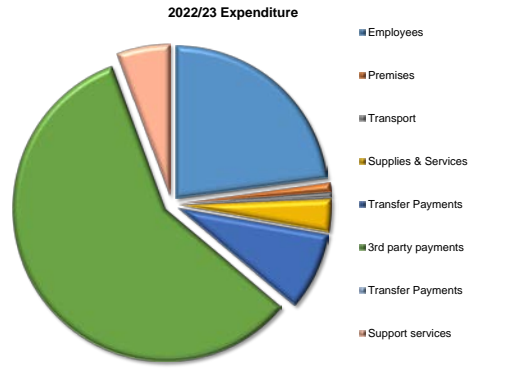
We are currently working through a procurement process for HIA for the DFG that is due for completion 2022.

Financial Summary

The housing needs and enabling service also encompasses prevention, rough sleepers and temporary accommodation. There are many challenges in this service such as the increase in demand for temporary accommodation and availability of properties in the borough. It is expected that the budget pressures experience during the current financial year will continue in future years until additional funding is identified either nationally or locally and more properties becomes available in the borough. Financial pressures is further compounded by the COVID-19 restrictions which has affected the services' ability to effectively perform all its duties around Homes in Multiple Occupations and the licencing thereof.

DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	5,547	8,137	6,548	2,569	6,451	6,512	6,574	6,636
Employees	1,515	1,497	1,457	(31)	1,458	1,458	1,459	1,459
Premises	63	68	64	0	65	66	67	68
Transport	30	19	31	(16)	31	32	32	33
Supplies & Services	172	177	220	(65)	223	226	230	233
Transfer Payments	696	1,876	530	1,281	530	530	530	530
3rd party payments	2,661	4,055	3,815	1,400	3,713	3,769	3,825	3,882
Transfer Payments	0	0	0	0	0	0	0	0
Support services	342	378	363	0	363	363	363	363
Depreciation	68	68	68	0	68	68	68	68



Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	3,058	5,124	2,609	2,264	2,609	2,609	2,609	2,609
Government grants	585	1,687	136	47	136	136	136	136
Reimbursements	2,108	2,978	2,108	1,606	2,108	2,108	2,108	2,108
Customer & client receipts	365	459	365	611	365	365	365	365
Recharges	0	0	0	0	0	0	0	0
Reserves	0	0	0	0	0	0	0	0
Capital Funded	0	0	0	0	0	0	0	0
Council Funded Net Budget	2,489	3,013	3,939	305	3,842	3,903	3,965	4,027

Summary of major budget etc. changes 2022/23

Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Disabled Facilities Grant		589	1,000	-	827	827	720	280
LD Affordable Housing		0	50	0	1,533	145	0	0

Service expects that grant allocations will continue

2023/24

Service expects that grant allocations will continue

2024/25

Service expects that grant allocations will continue

2025/26

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Service Plan for : Library & Heritage Service

Service Manager: *Anthony Hopkins* Cabinet Member: *Councillor Brenda Fraser*

Overview of the service

Merton Library & Heritage Service is a high performing and low cost service. It has some of the highest usage and satisfaction rates of any service in London and has delivered a number of high profile projects that have received national attention. It is a statutory service governed by the 1964 Public Libraries and Museums Act. The service aims to remain a high performing and low cost service and to support the objectives of the Council by delivering excellent customer service in all that it does; integrating services and providing a broader offer to residents wherever possible and required; develop its online facilities to put them at the forefront of library technology; make our services even more accessible.

Merton's ambitions

Support our most vulnerable residents of all ages
 Maintain a clean and safe environment
 Create a great place to grow up and live in
 Build resilient communities
 Bridge the gap and reduce inequalities
 Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p><i>The last customer survey was conducted in November 2019 and performance is summarised as follows:</i></p> <ul style="list-style-type: none"> - 100% of respondents were satisfied with their library experience with 97% of respondents rating the library as very good/good, a 4% increase on the previous survey. - 100% of respondents were satisfied with the overall customer service they experienced with 97% rating it as very good/good, a 4% increase since the previous survey. - 95% respondents rated the inside of the library as very good/good, up from 91% since the last survey. - 100% of respondents considered Merton's 	<p><i>Usage of Merton's libraries has seen a steady increase year-on-year. In 2006 only 18% of the resident population regularly used their library service and this has now increased to 36% in March 2020. Figures have dropped off a little due to the current Covid-19 pandemic and the enforced closure of buildings. Whilst online services such as e-books and online reference materials have seen a significant increase in their usage they are a small but increasing element of the overall service offering.</i></p> <p><i>66% of Merton residents are library members and usage is at its highest amongst children and young people. Diversifying the service offer and enhancing digital services are key to</i></p>	<p><i>There a number of national and regional policy documents that have implications for the service. The main documents to note are:</i></p> <ul style="list-style-type: none"> - Public Libraries & Museums Act 1964 - 'Libraries Deliver; Ambition for Public Libraries in England' - DCMS commissioned 5-year strategy for public libraries in England - 'Libraries Covid-19 Recovery Toolkit' - Libraries Connected - 'Levelling Up Our Communities' - Dannie Kreuger MP. The report highlights libraries heavily as catalysts for community and high street recovery. 	<p><i>Merton's Library & Heritage Service has played an important role in making Merton a great place to live, work and study and are an important service as highlighted in the recent Your Merton consultation. It does this by working in a collaborative manner and in delivering on corporate objectives. The objectives in this Service Plan are aligned to making Merton's Library & Heritage Service an important part of the Council's ongoing continuous improvement plans and all objectives sit within the strategic themes of the Council's business planning documents.</i></p> <p><i>The impact of the Covid-19 pandemic has been significant to the service and has had an</i></p>

libraries to be a safe place with 95% of respondents rating the safety of the library as very good/good, an increase of 4% from the previous survey.

- 83% of respondents rated the choice of books as very good/good, a 6% increase in satisfaction since the last survey.

- 100% of respondents were satisfied with staff helpfulness with 96% rating it as very good/good, a 2% increase from the previous survey.

- 88% of all respondents said that the library had helped them in some way, a 20% increase since the previous survey.

The service is highly regarded and receives more compliments than complaints in an average year. The main areas for complaint are usually regarding public toilet and IT facilities.

Libraries hold a unique place within the community as a public space that is open to all. Where customers cannot make it to libraries a Home Visits Library Service provides books and other materials to people's homes. Increasingly Library Connect (pop-up library solution) is also used as a way of engaging with underrepresented groups.

Residents from BAME backgrounds make the most effective use of libraries with high proportions in particular of Asian and Black British people.

increasing usage. A focus is also on improving the way that services report the impact of what they provide and demonstrating how they impact on wider agendas such as health, community resilience and employability.

impact on the way that customers have traditionally accessed services . During lockdowns the service played an important role in supporting the Council's community response to the pandemic including playing an active role in the Community Response Hub, Shielding Service and food distribution. The partnerships developed during this work has enabled new projects to be developed, which are outlined in the Delivery Plan. The service also has trained and knowledgeable staff available to support any additional corporate pressures with regards to the Covid-19 response, should they be needed.

Where are we now?		
Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Continue to develop partnership approach to delivering services in libraries. Increase health partnerships and lead on key actions agreed within the C&H TOM relating to prevention.	Enhanced suite of health services available in libraries and delivering prevention programs in partnership with local organisations.	Carry forward
Promote the Heritage Strategy and increase community participation in heritage activities. Continue to draw in external funding, improve income streams and undertake work to revise the Heritage Strategy.	Consultation has been completed and the new Heritage Strategy has been published. Some additional funding bids have been approved and more are in the process of being developed	Carry forward
Continue to enhance the new library management system and make improvements to the customer website and app. Procure and install new self-service technology in 2021.	<p>New library management system has been implemented along with some new technological developments including the library customer app. A further development of customer facing services is expected to be released in 2022.</p> <p>Self-service technology has been procured and implemented. Libraries Plus technology is currently being piloted at 4 branch libraries before the new self-service offer is launched in April 2022.</p>	Carry forward
Continue to develop the Schools and Libraries Membership schemes for primary and high schools. Deliver the Arts Council England funded 'Project Sense' to enhance the offer for SEND children and to make physical improvements to the children's libraries at all sites.	Libraries and Schools Membership Scheme is embedded across all primary, SEND and high schools and digital elements of the offer are being expanded. The majority of the 'Project Sense' project deliverables have been achieved but some activity elements have been delayed due to the impact of the pandemic.	Carry forward

<p>Undertake customer surveys to gain user views and consult on any significant changes to service delivery. Continue to develop e-marketing services and undertake promotional activities such as Library Connect.</p>	<p>Customer Survey completed in October 2019 and showed high levels of customer satisfaction. Consultation has also recently been completed regarding developing the new Heritage Strategy.</p> <p>Online resources and e-marketing has been enhanced throughout the pandemic and further work is currently being undertaken to develop personalisation elements linked to customer accounts as part of the library services platform project. Review of promotional materials and web content also ongoing.</p>	Carry forward
<p>Implement agreed savings from the rollout out of coffee shops in libraries and further develop income sources such as Merton Arts Space whilst identifying new opportunities.</p>	<p>The service achieved its increased income targets for 2020/21 and had a good plan of activity for the following year. The pandemic has had an impact on income collection but this is slowly starting to recover and new opportunities are being developed to increase income collection.</p>	Carry forward
<p>Increase volunteer numbers and skills in supporting customers with more complex IT needs and promote 'channel shift' to online services.</p>	<p>Volunteer review completed and new roles drawn up to reflect current needs. Volunteer policies and procedures have also been revised. Ongoing work is being undertaken to further support residents into improving their digital skills.</p>	Carry forward
<p>Embed the new security services contract in libraries and monitor performance of the contract so that security guards play an active role in supporting services.</p>	<p>New contractor started in April 2020. Ongoing monitoring of performance continues. Changing in guarding arrangements linked to Libraries Plus rollout is scheduled for April 2022.</p>	Close
<p>Progress redevelopment opportunities for West Barnes Library and work collaboratively with partners to look at potential opportunities for other sites.</p>	<p>West Barnes Library redevelopment plans are being progressed subject to adequate resources being made available to project manage the procurement. Other integration opportunities regarding libraries with other services continues. Merton Arts Space has been a particular success in drawing in new audiences and developing the boroughs cultural offer.</p>	Carry forward

How will we get there?

Service Objective 1		Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions							
<i>Covid-19 Recovery Planning</i>		Build resilient communities							
		Bridge the gap and reduce inequalities							
		Statutory requirement							
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Visitor figures	153,849	Red	1,200,000	1,200,000	1,200,000	1,200,000	1,200,000	Monthly	High
No. of people accessing library by borrowing item or using a peoples network terminal at least once in previous 12 months	28,761	Red	56,500	56,500	56,500	56,500	56,500	Monthly	High
Active volunteers in libraries (rolling 12 month fig)	37	Red	230	230	230	230	230	Monthly	High
Projects / key activities to support the objective <i>(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)</i>									
Project / activity name	Description						Proposed start date		Proposed end date
<i>Library Opening Hours</i>	Configure library opening hours to adopt new Libraries Plus technology						Oct-21		Apr-22
<i>Library Income</i>	Analyse the impact of library income and develop plans for trying to regain income somewhere						Mar-21		Mar-23
<i>Site Reconfigurations</i>	Configure library buildings so that they provide a safe experience for customers to regain trust in using them						Apr-21		Ongoing
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
<i>Further national or local pandemic restrictions</i>						<i>Work closely with Public Health and Health & Safety colleagues to ensure that guidance is being appropriately provided. Highlight impact of any closures and mitigations</i>			
<i>Customer confidence in using the spaces</i>						<i>Proactive marketing and engagement plans to demonstrate the safety of the spaces and the services provided</i>			
Impact on the customer/end user									
<i>Recovery of services to levels that customers are used to pre-pandemic whilst also developing new approaches to service delivery</i>									
Partners / interdependencies									
<i>The plans are dependent upon Public Health, Health & Safety and Human Resources guidance</i>									

Service Objective 2				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
<i>Improving residents health outcomes with a particular focus on the most vulnerable in our communities</i>				Support our most vulnerable residents of all ages					
				Bridge the gap and reduce inequalities					
				Build resilient communities					
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% of participants reporting positive impact on their health and wellbeing as a result of attending a health focussed session	Not reported corporately	Does Not Apply	Not applicable	60%	65%	70%	70%	Annually	High
Number of health sessions delivered in libraries	Not reported corporately	Does Not Apply	Not applicable	360	360	360	360	Annually	High
Number of health partnerships developed	Not reported corporately	Does Not Apply	Not applicable	10	11	12	12	Annually	High
Projects / key activities to support the objective <i>(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)</i>									
Project / activity name	Description						Proposed start date		Proposed end date
<i>Prevention offer</i>	Continue to enhance the health prevention offer in libraries working collaboratively with partners. Improve techniques for recording and evaluating the impact of services. Launch new Mind Space health and wellbeing offer across all libraries.						<i>Apr-19</i>		<i>Mar-24</i>
<i>Campaigns and Events</i>	Ensure that key public health messages and events are well promoted and delivered both online and in libraries						<i>Apr-19</i>		<i>Ongoing</i>
<i>Information Offer</i>	Ensure that there are good levels of information available both online and through libraries. Deliver training to ensure that staff skills are continually developed.						<i>Apr-19</i>		<i>Ongoing</i>
Potential barriers to achieving objective									
<i>Description of barrier</i>				<i>Mitigating Actions</i>					
<i>Restrictions on access to using libraries and limits on events</i>				<i>Continue to closely follow and apply government guidance. Use other channels to deliver the offer</i>					
<i>Capacity amongst health colleagues to support programmes</i>				<i>Set out clear and realistic objectives that take into account potential scenarios</i>					
Impact on the customer/end user									
<i>Improved health and wellbeing of customers and better joined up approach to promoting health services in the borough</i>									
Partners / interdependencies									
<i>This work involves close collaboration with health colleagues and in particular Public Health and Adult Social Care colleagues</i>									

Service Objective 3				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
<i>Increase community participation in heritage services and raise awareness amongst residents of Merton's rich heritage.</i>				Create a great place to grow up and live in Build resilient communities						
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
Merton Memories web visits	Not reported corporately	Does Not Apply	Not applicable	52,000	56,000	60,000	60,000	Monthly	High	
Heritage Centre volunteer numbers	Not reported corporately	Does Not Apply	Not applicable	30	32	32	32	Monthly	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Heritage Strategy</i>	Publish the new strategy and monitor the delivery action plan.						<i>Jan-21</i>		<i>Dec-25</i>	
<i>Community Involvement</i>	Increase volunteering numbers for heritage services and increase community participation in services						<i>Apr-21</i>		<i>Mar-23</i>	
<i>Funding</i>	Continue to apply for external funding to improve the services available for residents						<i>Apr-21</i>		<i>Ongoing</i>	
Potential barriers to achieving objective										
<i>Description of barrier</i>				<i>Mitigating Actions</i>						
<i>Limited resources to deliver outcomes</i>				<i>Apply for external funding to support projects and be clear on what can be delivered with finite Council resources</i>						
<i>Impact on the way customers access service due to pandemic</i>				<i>Expand digital channels further and develop marketing and engagement plans to support this</i>						
Impact on the customer/end user										
<i>Increased access and understanding of the borough's rich heritage</i>										
Partners / interdependencies										
<i>This objective relies a lot on community response and in particular a number of heritage organisations that the service works closely with</i>										

Service Objective 4			Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
<i>Improving residents economic and employment prospects</i>			Support our most vulnerable residents of all ages						
			Bridge the gap and reduce inequalities						
			Create a great place to grow up and live in						
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of employability events / workshops delivered	Not reported corporately	Not Yet Known	Not applicable	96	96	96	96	Annually	High
Number of participants attending IT training sessions	Not reported corporately	Not Yet Known	Not applicable	1850	1900	1950	1950	Annually	High
% of participants reporting improved skills as a result of attending an employability and / or IT session	Not reported corporately	Not Yet Known	Not applicable	80%	80%	80%	80%	Annually	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
<i>Adult Learning offer</i>	Enhance the adult learning offer in libraries working collaboratively with all partners						<i>Apr-19</i>	<i>Mar-23</i>	
<i>Library Space</i>	Reconfigure space to facilitate residents in their search for new employment or to reskill. Develop more services in partnership with other organisations to support this and launch new						<i>Apr-21</i>	<i>Mar-23</i>	
<i>Digital Offer</i>	Enhance the digital offer through libraries and provide focussed support sessions for residents to get online. As part of this provide an IT equipment loan scheme.						<i>Sep-20</i>	<i>Mar-23</i>	
Potential barriers to achieving objective									
<i>Description of barrier</i>						<i>Mitigating Actions</i>			
<i>Capacity to be able to host events / activities</i>						<i>Be clear with partners what can be hosted. Reconfigure spaces where necessary</i>			
<i>Funding to deliver anticipated changes</i>						<i>Be clear on what can be delivered within existing budgets and apply for external funding when additional funds are required</i>			
Impact on the customer/end user									
<i>Improved range of services available to help improve residents economical and educational outcomes</i>									
Partners / interdependencies									
<i>The projects highlighted work closely with adult learning providers and employment agencies to provide the enhanced offer</i>									

Service Objective 5			Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
Enhance the Library & Heritage Service digital offer			Continuously improve						
			Create a great place to grow up and live in						
			Support our most vulnerable residents of all ages						
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of visitors accessing the library service online	236,897	Green	240,000	250,000	260,000	270,000	270,000	Monthly	High
Number of e-book / e-magazine items borrowed	New indicator for 2021-22	Does Not Apply	100,000	112,000	125,000	135,000	135,000	Monthly	High
% of self-service transactions	85%	Red	97%	97%	97%	97%	97%	Monthly	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Self-Service libraries	Implement new self-service offer and provide staffless library offer at the 4 branch libraries						Jan-21	Jun-22	
Library Services Platform	Launch and further develop the LSP to provide an enhanced customer online experience						Jan-21	Ongoing	
Merton Memories	Enhance the Merton Memories website and continue to provide more content online						Apr-21	Ongoing	
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
Budgetary constraints to implement new systems						Ensure that budgets are profiled and in place. The majority of changes are currently included in the Capital Programme			
Capacity to maintain and improve systems including independencies with other departments						Be clear on resources required and ensure that all projects are incorporated into IT Delivery Plans			
Supplier dependencies						Ensure robust contract management is in place with the option to enforce penalties for under performance			
Impact on the customer/end user									
Maintain access to library buildings whilst developing new technological platforms to improve the customer experience									
Partners / interdependencies									
The projects highlighted rely on close collaboration with internal and external IT providers									

Service Objective 6			Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
<i>Children and young people's offer</i>			Create a great place to grow up and live in						
			Bridge the gap and reduce inequalities						
			Continuously improve						
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of schools participating in Schools and Libraries Membership Scheme	Not reported corporately	Does Not Apply	Not applicable	46	46	46	46	Annually	High
% of Merton school children regularly accessing library services	Not reported corporately	Does Not Apply	Not applicable	72%	74%	76%	76%	Annually	High
Number of SEND tailored events and activities delivered	Not reported corporately	Does Not Apply	Not applicable	168	168	168	168	Annually	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date		Proposed end date
<i>Study Space</i>	Enhance space available to children and young people for studying and provide services to support with their educational development						<i>Sep-20</i>		<i>Ongoing</i>
<i>Schools and Libraries Membership Scheme</i>	Provide a membership and engagement offer for all Merton school children. Refine the offer to enhance the digital aspects of it						<i>Sep-20</i>		<i>Ongoing</i>
<i>Project Sense</i>	Complete activities outlined in Arts Council funded project and continue to improve the offer for SEND children and young people						<i>Apr-20</i>		<i>Ongoing</i>
Potential barriers to achieving objective									
<i>Description of barrier</i>						<i>Mitigating Actions</i>			
<i>Take up from schools</i>						<i>Continue to enhance engagement plans with schools and act on any feedback given</i>			
<i>Customer confidence in accessing spaces</i>						<i>Ongoing marketing and engagement plans</i>			
<i>Funding</i>						<i>Be clear on what can be delivered within existing resources and apply for additional funding, should it be required</i>			
Impact on the customer/end user									
<i>Improved service offer for children and young people that focuses in particular on underrepresented groups</i>									
Partners / interdependencies									
<i>The work involved will be in close collaboration with schools and the Council's Education department</i>									

People

The Library & Heritage Service has a comparable gender make up to other parts of the Council but is lower than most services in terms of overall age. Staff development will focus on providing staff with the skills in order to progress either through the service or develop transferable skills to make them more employable. Significant training will put into place for library staff to support the anticipated digital and operational changes highlighted in the Delivery Plan. A long standing developmental need of the service is to continue to improve staff commercial skills and this has been further highlighted due to the anticipated income challenges of the next few years.

All staff have now moved across to using Office 365 and ongoing support and training is required for some staff. The majority of staff work solely frontline but are all now set up to be able to work remotely should they need to. The Service operates 7 public libraries and a Heritage and Local Studies Centre. Some adaptations to the buildings will be required and are included in future capital plans to modernise the service offering and to adapt to resident feedback through exercises such as Your Merton. Plans to redevelop the West Barnes Library site are currently under way subject to appropriate resourcing being allocated to manage the project.

Technology

All staff computer solutions have recently been upgraded and are fit for purpose for the foreseeable future. The most significant changes will focus on our customer facing technology and in particular the implementation of new self-service technology and staffless libraries. There is also ongoing work to enhance the customer facing online offer. The majority of IT projects identified are included in the Capital Funding programme and IT resources have been agreed. Mind Space digital elements are currently being developed in consultation with IT and procurement colleagues.

Service improvement

Consideration for further enhancing the services processes focusses on the digital elements identified and improving the commercial skills of staff to generate additional income.

The service currently shares a number of its ICT elements such as the Library Management System with other authorities as part of The Libraries Consortium (TLC). It also shares some procurement contracts with other authorities too. It has explored further shared service options and presented various options for outsourcing previously. The decision of previous reviews was to continue to maintain the service in house and considering the additional volatility in the outsourced library market at present it is recommended that the service continues to be delivered by an in house team. The service will continue to explore options to share services to improve outcomes and efficiencies for residents.

Financial Summary

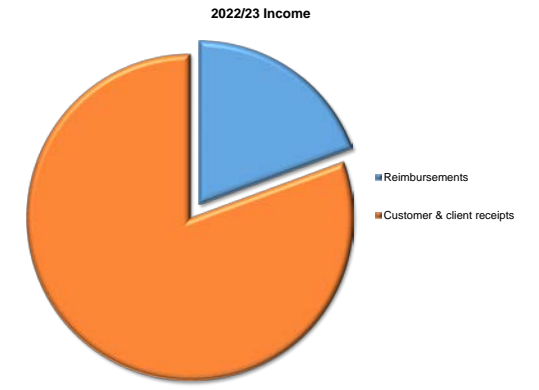
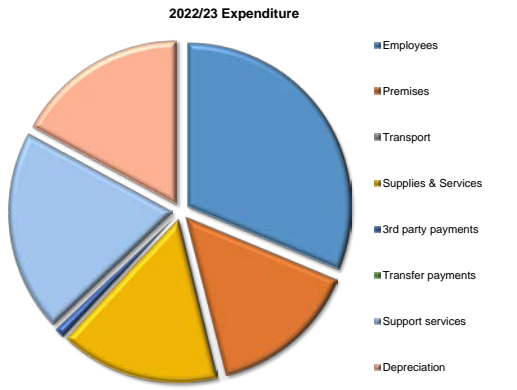
Merton has one of the most effective library services in London. Due to the current pandemic a number of the income generation elements such as hire of spaces and PC printing have had a negative impact on budgets. In order to achieve a balanced budget libraries will need to work creatively to attempt to bring people back into using the spaces, which is a challenge facing many sectors. Further deployment of technology will also enable the service to work in a more efficient way and as outlined in future savings plans.

DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	3,591	3,683	3,626	21	3,635	3,671	3,707	3,745
Employees	1,139	1,113	1,138	(29)	1,138	1,138	1,138	1,138
Premises	523	595	523	68	536	544	552	560
Transport	4	0	4	(3)	4	4	4	4
Supplies & Services	586	581	580	3	575	602	630	659
3rd party payments	35	0	35	(18)	36	37	37	38
Transfer payments	0	0	0	0	0	0	0	0
Support services	683	773	725	0	725	725	725	725
Depreciation	621	621	621	0	621	621	621	621

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	460	268	426	25	438	498	498	498
Government grants	0	58	0	(65)	0	0	0	0
Reimbursements	119	36	85	69	85	85	85	85
Customer & client receipts	341	173	341	21	353	413	413	413
Recharges	0	0	0	0	0	0	0	0
Reserves	0	0	0	0	0	0	0	0
Other Funded	0	0	0	0	0	0	0	0
Capital Funded Net Budget	3,131	3,416	3,200	46	3,197	3,173	3,209	3,247

Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Libraries Buildings		0	0	0	0	0	200	60
Libraries IT		174	200	0	140	0	0	350
	0	174	200	0	140	0	200	410



Summary of major budget etc. changes								
2022/23								
2023/24								
Capital: Library Management System £140k. Revenue includes savings of £60k. □								
2024/25								
2025/26								

Service Plan for : Merton Adult Learning

Service Manager: *Anthony Hopkins* Cabinet Member: *Councillor Brenda Fraser*

Overview of the service

The London Borough of Merton is committed to providing high quality and sustainable adult learning in order to improve the social, economic, health and wellbeing of our residents. This is delivered through a strategic investment approach: commissioning provision to the best providers in the field and using an evidence based approach to inform commissioning decisions.

The service aims to reduce inequalities across the borough by focussing investment on those most socially and / or economically disadvantaged whilst providing a broad range of learning opportunities to develop all resident's skills.

Merton's ambitions

Support our most vulnerable residents of all ages
 Maintain a clean and safe environment
 Create a great place to grow up and live in
 Build resilient communities
 Bridge the gap and reduce inequalities
 Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p><i>Feedback and evaluation is gathered from all learners. Learner feedback is very high with 99% of learners rating teaching and learning as good or above.</i></p> <p><i>The service was Ofsted inspected in November 2019 was rated as 'Good' under the new Education Inspection Framework. Ofsted comments that:</i></p> <p><i>"Learners gain a range of benefits from their courses. They enjoy the subjects they study. Those facing social isolation build their self-confidence and form new friendships while they study. Learners are taught valuable skills that</i></p>	<p><i>1,843 learners enrolled on adult learning courses in the last academic year. This figure is expected to increase as services are redesigned to support residents to learn new skills in response to the Covid-19 pandemic. The service has also been successful in receiving additional grant funding from the Greater London Authority (GLA) to deliver new provision.</i></p> <p><i>The new strategic objectives for the service were agreed by Cabinet in January 2020 and they align with the emerging themes of the Your Merton consultation exercise. They focus in particular on improving the social, economic and health outcomes of residents with a focus</i></p>	<p><i>Merton Adult Learning relies solely on external grants to provide its provision. From the 2019/20 academic year the majority of the grants are now administered by the GLA with a small amount of funding also allocated by the ESFA for any learners who do not live in the London area.</i></p> <p><i>The main policy documents for the sector are:</i></p> <ul style="list-style-type: none"> <i>• 'Skills for Londoners Strategy' - Greater London Authority</i> <i>• 'Education Inspection Framework' - Ofsted</i> 	<p><i>Merton's Adult Learning service has transformed since becoming a commissioning service in 2016. It now provides excellent value for money, has a curriculum that addresses residents skills needs and provides excellent outcomes for learners.</i></p> <p><i>The recently agreed strategic objectives set out the ambition for the service. As part of its improvement plans the service has a Quality Improvement Plan (QIP) with its providers that sets out plans for continuous improvement.</i></p> <p><i>The service will play a key role in supporting</i></p>

help increase their self-esteem and play a more active role in the community. Learners who are not confident with English improve their speaking and comprehension.

Tutors create a positive work-ethic among learners. It helps learners to develop the behaviours they need to go on to study at a higher level or increase their prospects of employment.

Learners receive a range of advice and guidance that enable them to make the right career and study choices. Specialist careers advisors know what learners who have been out of work for some time need to help them seek employment. Tutors help learners with learning difficulties and/or disabilities and their families find the right next step for them.

Learners appreciate the high-quality accommodation at the community venues in which lessons take place. They make productive use of the resources at the various community settings. Learners feel safe and know whom to approach should they have any concerns.

Tutors are experienced, knowledgeable and well qualified in their subjects. They have high expectations for their learners.

Leaders and managers ensure that learners benefit from high-quality courses. They pay close attention to planning a curriculum that

on supporting residents from more deprived wards.

The new objectives fit well with local and national strategies and the curriculum will evolve to reflect the job and skills market of Merton residents and will utilise specialist providers to enable these changes. The borough relies significantly on local data intelligence to inform future curriculum decisions.

the recovery of the borough by providing high quality learning to resident's to support them into improving their social, health and economic outcomes. Impact is key to demonstrating this and the service will continue to further develop its quality processes to better record and demonstrate this.

meets the social, economic and health priorities of the borough.

Leaders and managers work well with local partners to shape and deliver the curriculum offer. They work with subcontractors who offer courses that meet their curricular ambitions.

Effective governance has resulted in leaders working well together to improve the quality of the curriculum.

Leaders and managers place a suitable priority on safeguarding. Leaders are thorough in checking the safeguarding arrangements at subcontractors before working with them. Staff are appropriately trained in safeguarding and the 'Prevent' duty. When they need to act to safeguard learners and promote their welfare they do so promptly."

Where are we now?

Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Continue to improve quality across the provision and respond to issues identified in the last Ofsted inspection. Complete annual Self-Assessment Reports and Quality Improvement Plans and work collaboratively with providers to drive up performance.	The service has been Ofsted inspected and has moved to the status of 'Good' across all judgment areas. Significant progress has been made in improving the quality of the provision and Self-Assessment Reports are produced annually and Quality Improvement Plans updated regularly.	Carry forward
Deliver against the 3-year strategic objectives outlined in the Merton Adult Learning Strategy.	New Adult Learning Strategy agreed by Cabinet in January 2020 and all projects identified are underway. The Strategy gives a good basis to continually transform the offer to respond to resident needs especially as a result of the impact from the Covid-19 pandemic.	Carry forward
Working with providers develop robust systems for the collection of progression and destination data to better inform curriculum development and the tracking of learner's development.	Improvements have been made in the capture and analysis of progression and destination data but further work still needs to be done and the service is working closely with its providers to achieve this.	Carry forward
Deliver a range of community and family learning initiatives in the borough to increase take up and proactively market services to residents with the greatest needs.	New contracts are in place to support this with a particular focus on provision in the east of the borough. Take up on courses has increased but could be higher as providers adapt to delivering course provision in new ways.	Carry forward
Make more effective usage of learner and community data to inform the commissioning of adult learning courses whilst retaining a healthy breadth of provision.	Evidence base continues to be developed to make the most effective use of service and wider community data. This data has been used extensively to influence curriculum decisions.	Carry forward
Embed new contractor arrangements under new framework and procure main supplier contract whilst continuing to develop the provider market in the borough.	Multi-provider contracts are in place and have resulted in a more diverse curriculum offer that is improving reach into priority community groups. The main supplier contract was awarded to South Thames Group and the contract started in August 2021. Reprocurement of some of the smaller provider contracts has started for the new contracts to start in 2022/23 academic year.	Carry forward

How will we get there?

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
<i>Covid-19 Recovery Plans</i>	Support our most vulnerable residents of all ages
	Bridge the gap and reduce inequalities
	Create a great place to grow up and live in

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of new learners per annum	Not yet provided (available end of academic year)	Not Yet Known	2,200	1,985	1,985	1,985	1,985	Annually	High
% overall success rate of accredited courses per annum	Not yet provided (available end of academic year)	Not Yet Known	90%	90%	90%	90%	90%	Annually	High
% of learners from deprived wards	Not yet provided (available end of academic year)	Not Yet Known	32%	33%	34%	35%	35%	Annually	High

Projects / key activities to support the objective *(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)*

Project / activity name	Description	Proposed start date	Proposed end date
<i>GLA Level 3 and new curriculum areas</i>	Implement new curriculum areas now permitted by GLA funding	<i>Sep-21</i>	<i>Ongoing</i>
<i>Provider Engagement</i>	Work with providers to increase curriculum offer in the community and deliver a blended offer of physical and online courses to meet resident demand	<i>Apr-20</i>	<i>Apr-23</i>
<i>Equipment loan scheme</i>	Operate an equipment loaning scheme so that disadvantaged learners have access to good quality ICT to support with remote learning	<i>Aug-20</i>	<i>Aug-22</i>

Potential barriers to achieving objective

Description of barrier	Mitigating Actions
<i>Ability for providers to respond swiftly to changing priorities</i>	<i>Work closely with providers and agree scope of what needs to be achieved</i>
<i>Covid-19 Government Restrictions</i>	<i>Monitor government guidance closely and work collaboratively with Public Health and Health & safety colleagues</i>

Impact on the customer/end user

This objective will mean that learners have access to a more diverse curriculum offer that is offered through different formats (e.g. class room, online) to assist them with improving their life chances

Partners / interdependencies

The projects are dependent on government guidance and will follow advice from colleagues in Public Health and Health & Safety. The service is fully funded by the Greater London Authority and the Education and Skills Funding Agency. As a result there are particular requirements of the funding that need to be met when delivering provision.

Service Objective 2			Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
<i>Embed new contractual arrangements</i>			Continuously improve						
			Bridge the gap and reduce inequalities						
			Build resilient communities						
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of new learners per annum	Not yet provided (available end of academic year)	Not Yet Known	2,200	1,985	1,985	1,985		Annually	High
Total enrolment numbers	Not yet provided (available end of academic year)	Not Yet Known	3,800	3,500	3,500	3,500		Annually	High
Cost per learner	Not yet provided (available end of academic year)	Not Yet Known	£375	£375	£375	£375		Annually	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date		Proposed end date
<i>Main Services Contract</i>	Award new contract for main services contract and embed new arrangements						Aug-21		Ongoing
<i>Contract Monitoring</i>	Continue to embed new contract arrangements with other providers and develop the offer						Apr-20		Apr-23
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
<i>Choice of suppliers available</i>					<i>Continue strategy of market development to encourage a more diverse range of providers to be able to deliver services</i>				
<i>Capacity</i>					<i>Be clear on what can be achieved within funding available and set realistic timescales</i>				
<i>Customer expectations of provision</i>					<i>Be clear on the priority curriculum areas whilst seeking to provide a broad course offer</i>				
Impact on the customer/end user									
<i>By improving the provider base learners should expect a higher quality and more diverse range of courses available that more effectively meet residents needs whilst providing good value for money.</i>									
Partners / interdependencies									
<i>The service works closely with Legal and Procurement colleagues to ensure that robust contracts are in place and that they are monitored effectively. As a commissioning service it is largely dependent on the good performance of its providers to deliver the desired outcomes.</i>									

Service Objective 3			Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
Continue to drive up the performance and quality of the service			Continuously improve						
			Bridge the gap and reduce inequalities						
			Support our most vulnerable residents of all ages						
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% overall success rate of accredited courses per annum	Not yet provided (available end of academic year)	Not Yet Known	90%	90%	90%	90%		Annually	High
% of learners progressing onto another learning opportunity or career path	Not applicable - new 2021-22 indicator	Does Not Apply	60%	62%	65%	67%		Annually	High
Retention rate of students on courses	Not applicable - indicator re-activated for 2021-22	Not Yet Known	95%	96%	97%	98%		Annually	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date		Proposed end date
Quality Improvement Plan	Embed Quality Improvement Plans across the provision and drive up performance and quality within providers.						Sep-20		Ongoing
Learning & Development	Ensure that Adult Learning team and providers receive appropriate training to support with development plans						Apr-21		Ongoing
Self-Assessment Report (SAR)	Publish annual SAR to demonstrate the impact of the service and how performance is improving						Apr-21		Ongoing
Potential barriers to achieving objective									
Description of barrier					Mitigating Actions				
Ability of providers to adapt to increased demands					Be clear on expectations and ensure that they are closely aligned to the Ofsted Education Inspection Framework and other national, regional and local strategies				
Impact on performance due to current pandemic restrictions					Adapt provision to accommodate new approaches and work closely with providers to embed these new arrangements				
Impact on the customer/end user									
Improving the quality of the provision will mean that learners have a more diverse and tailored offer that will better to support them to achieve their outcomes									
Partners / interdependencies									
The service is dependent upon the delivery of its commissioned providers to achieve this objective and will do so through robust contract management processes.									

Service Objective 4			Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
<i>Improve data quality and capture to better inform decision making</i>			Continuously improve						
			Bridge the gap and reduce inequalities						
			Create a great place to grow up and live in						
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% monthly data returns submitted within deadlines	Not reported corporately	Does Not Apply	Not applicable	99%	100%	100%		Monthly	High
Accuracy of monthly data reports	Not reported corporately	Does Not Apply	Not applicable	99%	100%	100%		Monthly	High
Projects / key activities to support the objective <i>(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)</i>									
Project / activity name	Description						Proposed start date		Proposed end date
<i>Management Information System</i>	Embed new management information system across the whole of the provision						<i>Apr-20</i>		<i>Aug-22</i>
<i>Data Reporting</i>	Improve the timeliness of performance reporting to support with improving quality judgments						<i>Jan-21</i>		<i>Ongoing</i>
<i>Progression and Destination Data</i>	Improve systems for the recording and monitoring of progression and destination data to better demonstrate impact						<i>Apr-20</i>		<i>Ongoing</i>
Potential barriers to achieving objective									
<i>Description of barrier</i>						<i>Mitigating Actions</i>			
<i>Provider unable to deliver the required technical solution</i>						<i>Robust contract management procedures and seek to learn from best practice elsewhere in the sector</i>			
<i>Single person dependencies</i>						<i>Develop the skills and knowledge of all service staff to better support this</i>			
Impact on the customer/end user									
<i>Not having up-to-date and qualitative data means that the service will struggle to monitor learner progress and quickly identify any improvement actions required</i>									
Partners / interdependencies									
<i>The service depends upon its commission providers to provide timely data submissions with little or no errors. The service also use an external company to host all of its data capture through the MIS</i>									

Service Objective 5			Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
<i>Deliver against the strategic objectives of the Merton Adult Learning Strategy</i>			Bridge the gap and reduce inequalities						
			Continuously improve						
			Build resilient communities						
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of new learners per annum	Not yet provided (available end of academic year)	Not Yet Known	2,200	1,985	1,985	1,985		Annually	High
% overall success rate of accredited courses per annum	Not yet provided (available end of academic year)	Not Yet Known	90%	90%	90%	90%		Annually	High
% of learners from deprived wards	Not yet provided (available end of academic year)	Not Yet Known	32%	33%	34%	35%		Annually	High
Projects / key activities to support the objective <i>(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)</i>									
Project / activity name	Description						Proposed start date		Proposed end date
<i>Adult Learning Strategy</i>	Embed new Adult Learning Strategy across whole provision						<i>Jan-20</i>		<i>Sep-23</i>
<i>Reporting</i>	Produce annual scrutiny reports and updates to the Advisory Panel on the delivery of the strategy						<i>Apr-20</i>		<i>Ongoing</i>
<i>Curriculum Development</i>	Utilise the services evidence base to better inform commissioning and curriculum decisions. Evolve the curriculum so that it adapts to the needs of Merton residents						<i>Apr-21</i>		<i>Ongoing</i>
Potential barriers to achieving objective									
<i>Description of barrier</i>						<i>Mitigating Actions</i>			
<i>Ability of providers to respond to the Strategy</i>						<i>Embed the Strategy as a key part of contracts and provider Quality Improvement Plans. Adapt plans in the event of priorities changing</i>			
Impact on the customer/end user									
<i>A clear strategy for improving the quality of adult learning means that learners will benefit from a more tailored provision in high quality settings with high quality tutors</i>									
Partners / interdependencies									
<i>This is a commissioning service and relies on its providers to embed the strategic objectives of the service and drive up quality amongst its teams</i>									

People

Merton Adult Learning has a Quality Improvement Plan (QIP) that incorporates all key training required by the commissioning team and its providers. Key to the QIP is keeping abreast of all developments from Ofsted and our funders the GLA and the ESFA. Training is incorporated into the plan to reflect this and individual CPD plans are in place for all staff, including those managed by providers. Core training around safeguarding is delivered annually.

Due to the Covid-19 pandemic providers are working in a more dynamic way delivering a blended mix of provision both online and in the classroom. Staff, and in particular tutors, are being supported to adapt to these new ways of working and funding from the GLA has been received to support with these changes. This is also a key feature of the QIP.

Staff development will also be undertaken within the team to reduce the dependency on individuals. An example of this is the work being undertaken with the MIS provider to provide more automated and timely performance information.

The commissioning team predominantly work remotely and these arrangements are working well. Regular monitoring visits to providers and classroom observations are important to ensure that quality standards are being met.

Technology

The services' IT requirements broadly meet the standard corporate ICT offer. The one exception is the specialist software used to manage learner data and for submissions to funders, which is the MIS system provided by Tribal.

Whilst already deployed a key element of that will be further work this year with the MIS. The work being undertaken will be by the commissioning team with the supplier and in collaboration with providers. This is to ensure that timely reports and performance information are produced and more fit for purpose. Work will also be undertaken to better report and analyse progression and destination data of learners. No other significant technological updates have been identified apart from ongoing staff use of online platforms.

Service improvement

The service has good plans in place to continually drive up improvement within the provision and as demonstrated via the recent Ofsted inspection that moved the overall status of the service to 'Good'. Building on these platforms the service is now working towards 'Outstanding' in some of its areas of work and these will be clearly demonstrated in the QIP and SAR.

Key areas for improvement are in improving the way the service uses data to inform the curriculum and adapts to the new requirements of residents in a post Covid-19 skills world. Other areas include the better use of management information and reducing one person dependencies within the team.

A full service review was concluded in 2016 with the move to the current commissioning model. This move has achieved the main aims of achieving financial sustainability and in developing a more dynamic curriculum that better meets the needs of Merton residents. The model is continually reviewed and best practice is viewed from across the sector.

Financial summary

This is a commissioning model which has proved to be successful in delivering an efficient service to Merton residents and was rated as good by OFSTED in 2019. In class delivery has been impacted by the pandemic but providers have become creative in blending in class and online provision. The service has recently been successful in receiving significant grants from the GLA to support residents with retraining and to develop their employability skills in a post-Covid environment.

DEPARTMENTAL BUDGET AND RESOURCES

Additional Expenditure Information

Revenue	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	1,893	1,353	1,498	(6)	1,498	1,498	1,498	1,498
Contractor's Fee	1,538	1,051	1,228	(4)	1,228	1,228	1,228	1,228
Employees (Commissioning Team)	200	200	200	(3)	200	200	200	200
Employees (LDD Curriculum Manager)	0	0	0	0	0	0	0	0
Support Service	32	35	32	0	32	32	32	32
Other Costs	122	67	38	0	38	38	38	38
Revenue	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	1,861	1,382	1,466	(6)	1,466	1,466	1,466	1,466
Adult Education Block Grant	1,861	1,382	1,466	(6)	1,466	1,466	1,466	1,466
Adult Apprenticeships Grant	0	0	0	0	0	0	0	0
Other Income	0	0	0	0	0	0	0	0
Council Funded Net Budget	32	(29)	32	(0)	32	32	32	32
Capital Expenditure	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
		0	0	0	0	0	0	0

An annual grant is receivable from the GLA (Greater London Authority) of £ 1.3m plus other small grant allocation from the Educations & Skills Funding Agency for 2020-21. There is a small increase in the grant for 2021/22 of £69k.

Service Plan for : Public Health

Service Manager:	<i>Dagmar Zeuner</i>	Cabinet Member:	<i>Cllr Rebecca Lanning</i>
Peer review date:	<i>01-Dec-21</i>	Name of peer:	<i>Phil Howell</i>
Date created:	<i>Dec-21</i>	Date of next review:	<i>Dec-22</i>

Overview of the service

Main statutory duties for Public Health in Local Authority comprise:

- -Strategy/system leadership for health – Health and Wellbeing Board, JSNA and Health and Wellbeing Strategy, independent Annual Public Health Report (all mandatory).
- -Commissioning/securing provision of a defined range of Public Health Services (including the following mandatory services: sexual health, NHS health checks, healthy child 0-5 services, National Child Measurement Programme) and commissioning support to the NHS (mandatory) and Council.
- -Health protection oversight (mandatory), including screening, infection control, emergency preparedness and immunisations.
- COVID-19 Pandemic response and recovery is the major public health priority in Merton, including:
 - Outbreak control and containment/living with COVID - active outbreak control will continue until at least end of Spring 2022; living with COVID, including vaccination, will continue for the foreseeable future and recovery from COVID may require focussed work over a number of years
 - Recovery/learning from COVID - including addressing the disproportionate impact of COVID, this will apply to all statutory public health duties outlined above.

Merton's ambitions

Support our most vulnerable residents of all ages
 Maintain a clean and safe environment
 Create a great place to grow up and live in
 Build resilient communities
 Bridge the gap and reduce inequalities
 Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<i>The service plan is informed by customer insights from a programme of community engagement on COVID, including COVID community champions; BAME Voice and Mencapengagement findings; Voluntary</i>	<i>The Joint Strategic Needs Assessment/Merton Story provides evidence on demographic trends and will focus on the impact of COVID in Merton, including the disproportionate impact on the east of the borough, BAME and other</i>	<i>Rapidly changing National policy and guidelines on COVID-19 will have a significant impact on how the public health service will operate. London guidelines through the London COVID Response Cell will have an impact. Sub-</i>	<i>The Public Health service plan will contribute to continuous improvement and implementation of public health strategies (diabetes, healthy weight, sexual health) and development of integrated commissioned</i>

<p>organisation outreach engagement. In addition, young people and parent engagement on commissioned services and strategy development, including surveys, focus group and young inspectors.</p> <p>Equality impact assessment will be undertaken on any service developments, including 0-19 Healthy Child services.</p>	<p>groups, and health inequalities. This will inform the objective for COVID recovery.</p> <p>Public health intelligence contributes to LBM modernisation, through the development of intelligence streams and data sets.</p>	<p>regional work across SW London will also be important.</p> <p>National changes in the NHS will have an impact including the development of Integrated Care Systems (ICS) and changes to strategic commissioning across the NHS, and the embedding of United Kingdom Health Security Agency (UKHSA) and Office for Health Improvement and Disparities (OHID) following disestablishment of Public Health England.</p>	<p>services, to deliver improved outcomes.</p> <p>The service plan will contribute to modernisation and recovery through its objective on COVID recovery, which includes prevention, early help and healthy places.</p>
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Where are we now?		
Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
<p>Objective 1: Service integration and transformation - support SID and MHCT boards to further develop and implement their respective programmes including: integrated community health and care services (children and adults); a personal prevention offer for adults; whole system approach to diabetes and potentially other long-term conditions; life-course sexual health strategy.</p>	<p>The impact of COVID-19 pandemic has resulted in a change to the timelines of integrated commissioning. NHS providers have been fully engaged in COVID response; staff have been redeployed to acute NHS roles; some services were halted and others adapted and shifted on-line, as providers worked under NHS command and control. In response to this, service integration and transformation of community services was postponed by 12 months.</p> <p>This objective will be taken forward under new Service Objective 2 in 2022/23 with the ambition of further service integration and transformation, including links to C&H Recovery and Reset Programme, by 2022.</p>	Carry forward
<p>Objective 2: Deliver Health and Wellbeing Strategy - embed health & wellbeing into council and partner business; with a focus on implementing healthy workplaces programme linking health and climate change; supporting whole system approach to tackling childhood obesity and diabetes (see above); strengthen CYP leadership for healthy place, i.e. through school neighbourhood action plans (SNAP).</p>	<p>Progress towards the delivery of the Health and Wellbeing Strategy has been adapted in light of the impact of the COVID-19 pandemic, including the disproportionate impact on BAME groups, older people, young people, carers and people with learning disabilities. Work on childhood obesity shifted to focus on food poverty; schools based activity was paused due to lockdown. Work on healthy workplaces focused of mental wellbeing, ensuring staff had flu vaccination and engagement of businesses in our Business Improvement Districts. There is a refreshed suicide prevention strategy.</p> <p>This objective will be taken forward under new Service Objective 2 in 2022/23.</p>	Carry forward

<p>Objective 3: Strengthen commissioning and commissioning support – develop integrated commissioning for children; public health strategic commissioning (end-to-end) & public health support to commissioning for health and wellbeing outcomes in order to deliver integrated service models.</p>	<p>The impact of COVID-19 pandemic has meant that commissioning and commissioning support has focused on supporting providers in adapting service models in response to COVID, to deliver safe services, shifting to on-line where appropriate and continuing to support most vulnerable service users. The long term nature of the pandemic and winter pressures increase the risks to service quality and safety.</p> <p>This objective will be taken forward under new Service Objective 3 in 2022/23.</p>	<p>Carry forward</p>
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How will we get there?

Service Objective 1: COVID-19 Response	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
COVID 19 - Effective Outbreak Control and developing flexible and scalable infrastructure to contain COVID in the future, in collaboration with Public Protection: including strategic leadership, working in partnership with NHS, UKHSA and OHID; providing the underpinning intelligence function; delivery of the Merton Local Outbreak Management Plan; developing scalable local contact tracing partnership (including case finding, backwards tracing); testing (including symptomatic and asymptomatic) and vaccination support; and engaging residents, including BAME communities, older people, carers, young people and residents with learning disabilities.	Support our most vulnerable residents of all ages
	Bridge the gap and reduce inequalities
	Statutory requirement

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Service Objective 1. will be performance measured through local programme governance.									

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
<i>Project / activity 1: Support Care Homes, Schools and High Risk settings.</i>	Provide outbreak management advice and infection prevention and control support to care homes, schools and other education settings and other high risk settings.	<i>on-going</i>	<i>Mar-23</i>
<i>Project / activity 2: Delivery of community engagement activity.</i>	Continue programme of proactive community engagement to build community trust and compliance with COVID-19 restrictions; to understand lived experience of residents; to understand and respond to the disproportionate impact of COVID. Building on COVID community champions; small grants to Voluntary sector; youth engagement, to support communities role in outbreak control.	<i>on-going</i>	<i>Mar-23</i>
<i>Project / activity 3: Support the development of infrastructure to contain COVID.</i>	Working in close collaboration with Public Protection (RSP), support the scalable development of targeted local testing approach and capacity (symptomatic and asymptomatic) and contact tracing partnership with NHS T&T, including case finding and backward tracing; support to NHS on preparation and delivery of COVID vaccination.	<i>on-going</i>	<i>Mar-23</i>
<i>Project / activity 4: Development of COVID intelligence and surveillance functions.</i>	Continue to develop COVID surveillance functions and health intelligence, and disseminate key intelligence to stakeholders to inform and support COVID approach.	<i>on-going</i>	<i>Mar-23</i>
<i>Project / activity 5: Ensure Effective Governance of the Outbreak Control Plan.</i>	Maintain effective Governance through Merton Outbreak Control Officers Group (MOCOG), Borough Resilience COVID Core Group and Health and Wellbeing Board community sub-group.	<i>on-going</i>	<i>Mar-23</i>

Potential barriers to achieving objective:

Description of barrier	Mitigating Actions
<i>Impact of increase in COVID on NHS provider capacity (Command and control)</i>	<i>Work in partnership with SWL CCG</i>
<i>Lack of Contain Outbreak Management Fund (COMF) to support Merton response, including community engagement and outbreak control staffing</i>	<i>Raising impact of lack of funding at CMT, London and National level.</i>
<i>Capacity in PH Team - ability to recruit and retain interim staff to work on COVID</i>	<i>Close liaison with HR, ongoing recruitment</i>

Impact on the customer/end user										
<p>-Residents supported to understand and comply with COVID 19 measures and restrictions through engagement approach</p> <p>-High-risk settings and Voluntary Organisations enabled to manage risk, comply with guidelines and communicate with stakeholders effectively</p> <p>-Schools able to respond effectively to guidance and undertake risk assessment and infection control and prevention</p>										
Partners / interdependencies										
<p>PH works in strong collaboration with public protection (Regulatory Services Partnership, E&R).</p> <p>Adult Social Care Team, C&H, School Improvement Team, CSF, SWL ICS, LCRC, UKHSA, OHID, SWL LAs, Voluntary Sector/Merton Connected, Schools and Education settings, Housing providers</p>										
Service Objective 2: COVID-19 Recovery					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
<p>COVID Recovery - Healthy, fair and green in context of COVID 19: this includes addressing inequalities that have been exacerbated by the disproportionate impact of COVID; prevention and early help, promoting healthy and green place (focus on interventions with co-benefits for health and sustainability such as active travel); staff wellbeing.</p>					Bridge the gap and reduce inequalities					
					Create a great place to grow up and live in					
					Build resilient communities					
Performance Measures										
Indicator	2021 / 22 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
Number of NHS health checks delivered by primary care	409 (Q2 2021/22)	Red	2754	pending new contract	pending new contract	pending new contract		Quarterly	High	
Percentage of dependent drinkers who have engaged in treatment (New indicator replacing the one on residents dependent on alcohol but not in treatment system)	27.3% (Q2, 2021/22)	Green	20%							
Proportion of all in treatment, who successfully completed treatment and did not re-present within 6 months - Alcohol	49% (Q2 2021/22)	Amber	50%							
Gap in childhood obesity between east and west Merton at Y6 (to halt then reduce the gap by levelling up in east)	10.4% (2017/18-2019/20)	Green	12%	11%	10%	9%		Annually	Low	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	

<i>Project / activity 1: Prevention and early help.</i>	Revise and continue to embed Prevention Priorities and influence wider aims and objectives of the C&H Recovery and Reset Programme and Health and Care Together Board priorities. Implement the '5 Prevention Priorities' model which focuses on: directory of services; network of connectors; staff training; healthy settings and embedding prevention into health and care pathways. Enhance this work with added focus on tobacco, physical activity, healthy diet, alcohol & other behaviours. Expanding priorities to include prehabilitation and early intervention and prevention. Delivery will be aligned with C&H Recovery and Reset and MHCT themes, with PH leads to support delivery planning, co-ordination, support and do-once tasks.	<i>Ongoing</i>	<i>Mar-23</i>
<i>Project / activity 2: Delivery of public health strategies including whole system approach to diabetes and childhood obesity; Sexual health strategy implementation; substance misuse and mental health.</i>	Work with partners to implement public health strategies, which will be adapted for COVID-19 recovery, including: <ul style="list-style-type: none"> • Whole systems Diabetes Action Plan in context of COVID-19 - 3 key themes: clinical oversight and service improvement; holistic individual care; and healthy place. • Child Healthy Weight Action Plan - 3 key themes: making childhood obesity everybody's business; supporting children young people and their families; and healthy place, which includes healthy food and the physical environment. • Sexual health strategy - 3 priorities: education and training; easy access to sexual health and wellbeing services; comprehensive sexual health and wellbeing, including support for vulnerable groups. • Substance misuse and mental health. 	<i>Ongoing</i>	<i>Mar-23</i>
<i>Project / activity 3: Healthy place, including workplaces and staff wellbeing.</i>	Working with partners to scale up healthy places and healthy work places across Merton. Reviewing the Health in All Policies action plan to consolidate the alignments with the climate change action plan and post COVID challenges, embedding equity. Particular areas of focus include housing retrofit schemes, air quality and active travel in collaboration with E&R. Work with Corporate Services around the Workforce Strategy. Continue work of the Dementia Action Alliance.	<i>Ongoing</i>	<i>Mar-23</i>
<i>Project / activity 4: Addressing health and social impacts of COVID-19 in Merton</i>	Building on insights from the JSNA/ Merton Story, to address health inequalities and the disproportionate impact of COVID in Merton.	<i>Ongoing</i>	<i>Mar-23</i>
Potential barriers to achieving objective			
<i>Description of barrier</i>		<i>Mitigating Actions</i>	
<i>Impact of increase in COVID on capacity in LA and NHS</i>		<i>Work in partnership with E&R, CSF and SWL ICS</i>	
Impact on the customer/end user			
<i>Disproportionate impact of COVID is a priority in recovery plans and services, with a focus on addressing inequalities in east of the borough.</i>			
Partners / interdependencies			
<i>PH works in strong collaboration with public protection (Regulatory Services Partnership, E&R), Adult Social Care Team, C&H, School Improvement Team, CSF, Corporate Services, SWL ICS, and LCRC/PHE, SWL LAs, Voluntary Sector/MVSC, Schools and Education settings, Housing providers</i>			

Service Objective 3: Strengthen commissioning and commissioning support				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
<i>Strengthen commissioning and commissioning support, making best use of our resources and benefits of integrated commissioning with partners: develop integrated commissioning for children; public health strategic commissioning (end-to-end) & public health support to commissioning for health and wellbeing outcomes in the context of NHS integrating care agenda and strategic commissioning reforms. ☑</i>				Support our most vulnerable residents of all ages					
				Build resilient communities					
				Continuously improve					
Performance Measures (these are from last year)									
Indicator	2021 / 22 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Health Visiting - % of New Birth Reviews in 14 days of birth	95% (May 2021/22)	Green	90%	90%	95%	95%		Monthly	High
Breastfeeding at the 6-8 weeks review (partially or totally)	82.5% (May 2021/22)	Green	70%	70%	70%	70%		Monthly	High
% of participation in National Child Measurement Programme at age 10-11 years (Year 6) for the academic year	Data collection paused due to COVID	Does not apply	95%	95%	95%	95%		Annually	High
% young people (under 25) leaving treatment where substance misuse has reduced or client become drug free.	92% (Q2 2021/22)	Green	85%	85%	85%	85%		Quarterly	High
Percentage of total attendances of eligible service users within the 15-24 age group who accepted and received a Chlamydia test	58.9% (Q1 2021/22)	Red	80%						
New Dementia action alliance members (cumulative)	9 (Q2 2021/22)	Red	30						
New service users matched with volunteers for befriending service (New indicator replacing the one on falls)	20 (Q2 2021/22)	Green	80						
% of eligible people offered an HIV test and who accept the test	86.7% (Q1 2021/22)	Amber	90%	pending new contract	pending new contract	pending new contract		Quarterly	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
<i>Project / activity 1: Development of Integrated Community Services</i>	Support the long term ambition to develop integrated community health and care services, contributing to the NHS integrating care agenda and strategic commissioning reforms and Public Health England reforms. Contribute to NHS/ICS and UKHSA/OHID reform at London and sub-regional level.						<i>Ongoing</i>	<i>Mar-23</i>	

<i>Project / activity 2: Development of CYP Integrated Commissioning</i>	Continue the development of CYP Integrated commissioning, across PH, CSF and SWLCCG, working jointly to secure quality services and value for money in context of financial pressures. Priorities include community health services 0-19; risk and resilience; and employability.	<i>Ongoing</i>	<i>Mar-23</i>
<i>Project / activity 3: Sexual Health Services:</i>	Extend contract for integrated sexual health services from Sept 2022 -March 2024. Develop and agree an approach to the commissioning of integrated sexual health services from April 2024 in order to improve outcomes and secure value for money.	<i>Ongoing</i>	<i>Mar-23</i>
<i>Project / activity 4: C&H Commissioning Review</i>	Input to the C&H review of commissioning, identifying lessons from elsewhere and implement agreed changes.	<i>Ongoing</i>	<i>Mar-23</i>
Potential barriers to achieving objective			
<i>Description of barrier</i>		<i>Mitigating Actions</i>	
<i>Ongoing impact of COVID on provider capacity and services including NHS</i>		<i>Work in partnership with SWL CCG, Prioritise high risk services for quality assurance</i>	
<i>Ongoing impact of COVID on SWL ICS</i>		<i>Careful review of options around integrated community services</i>	
<i>Financial pressures</i>		<i>Work with CCG and providers to maximise efficiency</i>	
Impact on the customer/end user			
<i>Improved quality and access to services for residents</i>			
<i>Improved health outcomes</i>			
Partners / interdependencies			
<i>PH works in strong collaboration with Adult Social Care Team, C&H, CSF, SWL CCG, and Voluntary Sector/Merton Connected</i>			

People

Additional staff have been funded from the COVID-19 Outbreak control funds to expand capacity to deliver the Merton Outbreak Control Plan, support mapping and risk assessment of high risk settings, undertake Infection Prevention and Control, undertake surveillance and engage with residents and vulnerable groups. The ability to recruit and retain interim staff has been challenging and lack of clear direction of COMF, means that staff may find alternative employment.

The core Public Health team workforce numbers have remained static (add WTE) however there are a number of new staff members and staff have taken on additional roles in response to COVID-19 requirements, including enhanced health protection ; increase staff management etc. Like many other teams, the PH team have performed admirably throughout the pandemic and have a general feeling of exhaustion, which will be closely watched by PH SLT.

The whole Public Health Team is mostly remotely which adds pressures on management and team development needs. In particular a number of new and interim posts find creation of new partnerships difficult remotely and need effective remote management and support, and efficient HR processes.

Technology

In the move to remote working all staff in the PH team have been provided with Laptops, and mobile phones as appropriate. This enables the team to work collaboratively using Office 365; skype, Microsoft teams; access to I-Trent and E5.

The main technology need is to ensure that remote working is effectively supported by efficient technology, in particular virtual meetings via skype and teams, to ensure productivity. Skype is often not working. We have a need for easy syncing with the cloud. We require additional support and training around Sharepoint, E5, corporate procurement systems. We also are seeing new technology needs as part of population health management, for example our analysts are learning to use R (an open source analytics tool) as part of a regional capacity building programme.

For commissioned services COVID-19 has resulted in a move to greater use of technologies, through an increase on-line virtual service delivery, and increase use of London e-service for sexual health. This will remain under review to assess which virtual approaches should be adapted in the longer term.

Service improvement

The main area of service improvements is the management of COVID-19 and COVID-19recovery, which includes outbreak prevention and control, surveillance and intelligence and working with partners to support the development of infrastructure to contain COVID.

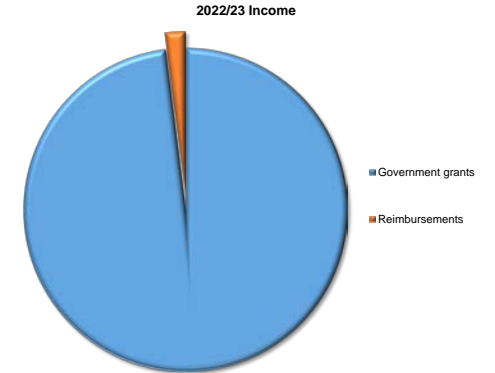
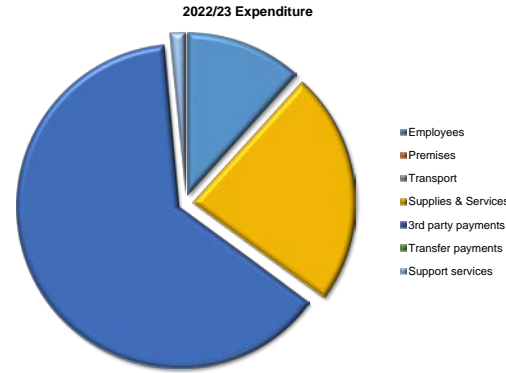
Service improvements in commissioned services include increase use of digital and remote technology, including addressing digital exclusion, to improve service access; and service modernisation through innovation and development of service models, such as development of skill mix.

Financial Summary

Public Health has many challenges and an increased role as a result of the COVID pandemic. The current grant allocation is insufficient to meet the increasing demands on this service coupled with the annual pressures from the increases in cost as a result agenda for change, pension costs and commissioned contracts.

DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	10,350	12,154	10,766	1,331	11,149	11,149	11,149	11,149
Employees	1,299	2,331	1,298	881	1,298	1,298	1,298	1,298
Premises	2	86	2	43	3	3	3	3
Transport	2	1	2	0	2	2	2	2
Supplies & Services	2,584	3,001	2,605	118	2,605	2,605	2,605	2,605
3rd party payments	6,305	6,561	6,696	289	7,078	7,078	7,078	7,078
Transfer payments	0	0	0	0	0	0	0	0
Support services	157	174	163	0	163	163	163	163
Depreciation	0	0	0	0	0	0	0	0
Revenue £'000s	Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	15,823	17,627	10,766	1,331	11,149	11,149	11,149	11,149
Government grants	15,597	17,366	10,546	1,260	10,928	10,928	10,928	10,928
Reimbursements	227	260	220	71	221	221	221	221
Customer & client receipts	0	0	0	0	0	0	0	0
Recharges	0	0	0	0	0	0	0	0
Reserves	0	0	0	0	0	0	0	0
Capital Funded	0	0	0	0	0	0	0	0
Council Funded Net Budget	(5,473)	(5,473)	(0)	0	0	0	0	0
Capital Budget £'000s	Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
n/a		0	0	0	0	0	0	0



Summary of major budget etc. changes

2022/23
Assuming same level of funding as in years 2020/21 and 2021/22, pending confirmation from Government on funding distribution or business rates retention scheme.
2023/24
2024/25
2025/26

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Corporate Services

Service Plan for : Corporate Governance

Service Manager: <i>Louise Round</i>	Cabinet Member: <i>Councillor Tobin Byers</i>
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Overview of the service

Corporate Governance provides a number of services underpinning the democratic functions of the Council (Democracy Services, Information Governance and Electoral Services) and which are designed to assist it in upholding the highest standards of governance, as well as some outward facing services, namely complaints and local land charges. It also acts as the host for the South London Legal Partnership (SLLP) which provided legal services for the 5 South West London Councils.

Merton's ambitions

- Support our most vulnerable residents of all ages
- Maintain a clean and safe environment
- Create a great place to grow up and live in
- Build resilient communities
- Bridge the gap and reduce inequalities
- Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p><i>SLLP asks its clients, who are officers in the five partner councils, to complete customer satisfaction questionnaires at the completion of each matter. They consistently return ratings of excellent or very good across all categories.</i></p>	<p><i>The demand in most parts of Corporate Governance is driven by the demands on other council teams. In SLLP there has been a large increase in requests for employment and procurement advice and the backlogs in the courts will keep pressure on the social care and litigation teams for the foreseeable future. The significant increase in land charges searches seems likely to continue well into next year. The local elections will be run on new ward boundaries, it is as yet unknown to what extent safeguards will need to be put in place to run the poll in a Covid secure way.</i></p>	<p><i>SLLP will need to remain alive to legislative changes attributable to Covid-19, Brexit and other policy reform, including to the planning system.</i></p>	<p><i>The provision of high quality proactive legal advice across the whole range of local authority functions will enable Merton to be forward looking and efficient in the delivery of its business plan. That plan is underpinned by the democratic accountability of elected members so the support provided to them is crucial. When things do go wrong, it is important that residents receive an empathetic and swift response to their concerns and that lessons are learned. The Complaints team has a critical role to play in improving customer experience.</i></p>

Where are we now?		
Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
<p>Efficiency Programme: To further reduce spend on printing committee agendas by moving CMT members to paperless agendas for LSG, Council, Cabinet and other committees. To encourage Cabinet Members and level 2 managers to follow suit. To encourage the Mayor and Group Leaders to produce electronic Christmas cards to save money on print and postage. To continue to monitor and review the impact of the Service Level Agreement in the Mayor's office, in particular in relation to the spend on drivers, and negotiate further changes as required to achieve manageable levels of activity and further reduction in spend. To promote online event bookings to save staff time and improve service for customers.</p>	<p>Achieved paperless agendas for officers, some progress made with members but limitations in the modern.gov application make this a little difficult.</p>	<p>Close</p>
<p>Scrutiny Improvement Programme: To build on the recommendations of the review carried out by the Centre for Public Scrutiny in order to improve effectiveness and impact of the scrutiny function and to engage all non-executive councillors in scrutiny activities. The action plan will be developed by a cross party councillor working group and agreed by the Overview and Scrutiny Commission and reviewed each year when it receives the Annual Member Survey. Increase public involvement and use of external expert witnesses.</p>	<p>Protocol for external scrutiny has been revised and will be in place for the next municipal year.</p>	<p>Close</p>
<p>Creation of centralised Local Land Charges Register: Review of LLC service delivery; dependent on national directive.</p>	<p>Ongoing- scoping work just beginning on project work to put in place foundations for transfer to HM Land Registry - preparation stage 22/23. Migration 23/24.</p>	<p>Carry forward</p>

<p>2018/22 Administer statutory elections, referendums and ballots. Administer full borough council elections in 2022, Mayor of London and London Assembly elections in 2020, and the next parliamentary General Election (currently scheduled for 2024) together with any other referendums and ballots that may be required.</p>	<p>Mayoral election run successfully in 2021 in a Covid Secure way. Preparations on going for full borough council elections in May 2022. These elections will be run on new ward boundaries.</p>	<p>Carry forward</p>
<p>Work with Local Government Boundary Commission on planned Electoral Review of Merton - implementation for 2022 Council elections</p>	<p>Polling district review completed and agreed by SGP Committee in November 2021. Register of electors will be re-published on new ward boundaries on 1 Feb 2022 in preparation for local elections in May.</p>	<p>Close</p>
<p>Data Protection Act (DPA18) / General Data Protection Regulation (GDPR) Refresh of all information governance related policies and strategies and promote to all staff.</p>	<p>Ongoing.</p>	<p>Carry forward</p>
<p>Increase 3rd party income To increase income from fees and charges of 3rd parties across all partner councils and explore generating income from providing legal advice and support to other authorities. Target: £230k .</p>	<p>Target reduced mid-year but looks likely to be achieved GB agreed increase in s106 charges in October .</p>	<p>close</p>
<p>Further expansion of SLLP To provide an expanded legal support and advice service to Achieving for Children. Income target for 2019/20 - £50k; target for 2020/21: £80k.</p>	<p>Royal Borough Windsor & Maidenhead work did not proceed.</p>	<p>Close</p>
<p>Develop Transactional Team To establish a transactional team for high volume routine matters to deliver efficiency savings.</p>	<p>Partially complete. Property notices being dealt with by PM team.</p>	<p>Carry forward</p>

How will we get there?									
Service Objective 1				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
To implement the boundary commission review in time for the May 2022 elections and to prepare to run those elections in a safe and efficient manner				Continuously improve Statutory requirement					
Performance Measures									
Indicator	2020/12 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of new electors added to the register of electors	20,950	Red	25,000	25,000	25,000	25,000		Annually	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Project / activity 1	Work with the GIS team to review the ward boundaries, carry out a polling district review allocate polling places						Jun-21	Feb-22	
Project / activity 2	Produce project plan for elections and implement it						Nov-21	May-22	
Potential barriers to achieving objective									
Description of barrier				Mitigating Actions					
Re-emergence of Covid restrictions				Use lessons learnt from re-scheduled 2020 elections for running of poll.					
Impact on the customer/end user									
Process is accessible for electors and candidates, election is perceived to be well run									
Partners / interdependencies									
All council staff									
Service Objective 2									
Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Prepare the local land charges function for migration to the Land registry in 23/24				Continuously improve Statutory requirement					
Performance Measures									
Indicator	2020-21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
LLC Official searches completed within 5 days	99.24%	Green	95%	95%	95%	95%	95%	Monthly	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Project / activity 1	Carry out data quality assurance review						Jan-22		
Project / activity 2	Transfer function to E&R						Dec-22		
Project / activity 3	Draw up project plan in conjunction with the Land Registry						Spring 22		
Project / activity 4	Monitor turnaround time for land charges searches						Spring 22		
Potential barriers to achieving objective									
Description of barrier				Mitigating Actions					
Quality of current data				Commission data improvement support					
Skills and capacity to oversee the project				Commission bespoke project support					
Impact on the customer/end user									
This work should improve the quality of the information being given to the end user and enable a more effective electronic solution									
Partners / interdependencies									
E & R planning and building control team, IT M3 manger, the Land Registry									

Service Objective 3				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
Develop Members Induction Programme for new intake of Cllrs in May 2022.				Continuously improve						
				Statutory requirement						
Performance Measures										
Indicator	2020-21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
High member satisfaction with induction programme	N/A	Does Not Apply	85%	N/A	N/A	N/A	N/A	Annually	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Project / activity 1	Members moved into fully paperless environment						May-22		May-23	
Project / activity 2	Working group established to produce high quality members induction programme						Dec-21		May-22	
Potential barriers to achieving objective										
Description of barrier					Mitigating Actions					
Poor cooperation between partners					Regular working group meetings					
Impact on the customer/end user										
Members receive a good quality induction programme enabling them to perform their role of Cllr to a high standard. Members use of paper is reduced in line with environmental targets.										
Partners / interdependencies										
HR, ICT, Policy, Scrutiny, Facilities										
Service Objective 4				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
				Continuously improve						
				Select						
Performance Measures										
Indicator	2020/21 Actual	RAG	2021/22	2022/23	2023/24	2024/25 Target	2025/26	Frequency	Polarity	
% FOI requests dealt with in time (20 days)	85.81%	Red	90%	90%	90%	90%	90%	Monthly	High	
No formal reports issued by the LGO	N/A	Does Not Apply	0	0	0	0	0	Annually	Low	
Subject Access Requests which are answered in time or given an extended deadline	NEW FOR 2021-22	Does Not Apply	90%	90%	90%	90%	90%	Monthly	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Project / activity 1	Cross skilling team members and building up knowledge in specialist areas						26th JULY 2021		Ongoing	
Project / activity 2	Pilot of using Visual Files as a case management system to manage FOI/EIR/SAR requests						Jan-22		Mar-22	
Project / activity 3	Implementing using VF as a case management system						Apr-22		ongoing	
Potential barriers to achieving objective										
Description of barrier					Mitigating Actions					
If VF proves not to be as useful as first expected					Procure a bespoke case management system					
Impact on the customer/end user										
Faster response time to FOI/EIR/SAR requests										
Partners / interdependencies										
Highlight any interdependencies where other council services or partner organisations are linked to the delivery of this objective. If referring to another council service, please include the name of the team and department.										

Service Objective 5				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Ensureing compliance Re: IG/Data Protection				Statutory requirement					
				Continuously improve					
Performance Measures									
Indicator	2020-21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Project / activity 1	Reviewing & strengthening the role, & output of the IG board						Nov-21	ongoing	
Project / activity 2	Reviewing & updating council IG/date protection policies and privacy notices						Aug-21	Mar-22	
Project / activity 3	making more use of key compliance documents/processes IAR and IG register							ongoing	
Project / activity 4	create a user friendly DPIA						Nov-21	Jan-22	
Project / activity 5	review and apply council records retention schedules						Jan-22	Jul-22	
Potential barriers to achieving objective							<i>Mitigating Actions</i>		
Lack of understanding of IG issues, differing levels of engagement across the council, small team									
Impact on the customer/end user:									
better awareness of information security requirements, fewer data breaches.									
Partners / interdependencies									
Service Objective 6				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Implement SLLP Audit/Service Plan agreed by the Governance Board				Continuously improve					
Performance Measures									
Indicator	2020-21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Increase business opportunities	Increase work carried out for non-partner councils and review fees and charges to external bodies						01/04/2022	31/03/2023	
Potential barriers to achieving objective							<i>Mitigating Actions</i>		
Description of barrier									
Impact on the customer/end user									
Partners / interdependencies									
Service Objective 7				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Improve recruitment & retention of staff				Continuously improve					

Performance Measures									
Indicator	2020-21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Review pay structure of SLLP	Engage Kornferry to carry out market comparison of roles and make recommendations to SLLP Governance Board						01/04/2022	31/03/2023	
Raise awareness of equality issues	Engage Black Thrive Global to consult staff and produce report and implement improvement plan						01/04/2022	31/03/2023	
Career development/talent management	Develop a programme for coaching & mentoring						01/04/2022	31/03/2023	
Potential barriers to achieving objective									
Description of barrier					Mitigating Actions				
Impact on the customer/end user									
Build more resilient and motivated workforce to provide a more effective service to partner councils									
Partners / interdependencies									
Service Objective 8									
Ensure IT systems robust Use Merton's Azure tenancy for case management system					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate				
					Continuously improve				
Performance Measures									
Indicator	2020-21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Move location of case management system	Use Merton's Azure tenancy						01/04/2022	31/03/2023	
HMCTS Public Law automation	Work with HMCTS to digitise family law proceedings						01/04/2022	31/03/2023	
Potential barriers to achieving objective									
Description of barrier					Mitigating Actions				
Impact on the customer/end user									
Will reduce time lost due to unreliability of citrix, improve staff morale and make the service more effective.									
Partners / interdependencies									

People

SLLP has carried out a significant amount of recruitment this years using Penna and more innovative deployment of social media and on line targeting but has still struggled to recruit to senior posts . We have converted a number of agency staff into permanent posts but are still reliant on locum support especially in the children's social care and procurement teams. We have initiated a pay and structure review in order to reduce reliance on locums and market supplements and to provide more career development opportunities. We will be supported by external bechmarking advice and colleagues in HR. We recruited 3 new trainees and 2 kickstart staff and have launched a mentoring scheme - 25 colleagues now have mentors from within the practice. We have commissioned an analysis of our approach to race equity and the findings have been shared with all staff. The full report is due by the end of December and we wil co design an action plan with all staff. The newly merged Democratic Services and election teams are working well together and will provide resilience for May's elections. The information governance team has been restructured, with the head of the team taking redundancy, leading to a saving. Both the information team and the land charges team are now being managed within SLLP. The complaints team has moved to Communications and Engagement.

Technology

The Democratic Services team continued to run virtual and hybrid Council meetings. Sharepoint is increasingly in use to enable collaborative working, for instance in the information asset register. There will be close working with IT to understand the requirements of migration of the land charges function to HM Land Registry and a scoping exercise to produce a business case for a case management system to manage complaints. Consideration will be given to using tablets in polling stations for 2022 elections. In SLLP, we are working with the courts service to implement an automated single justice procedure and with the county court to allow for bulk uploads of debt recovery work. An upgrade to the legal case management system is in progress to facilitate this. We are developing a rolling programme of workflows in high volume cases to optimise the system functionality.

Service improvement

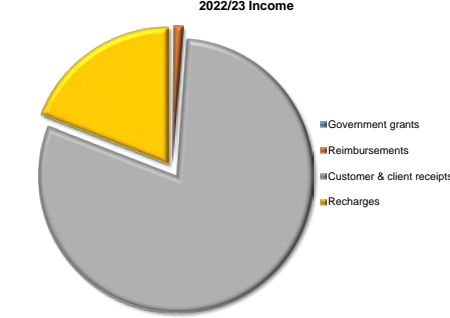
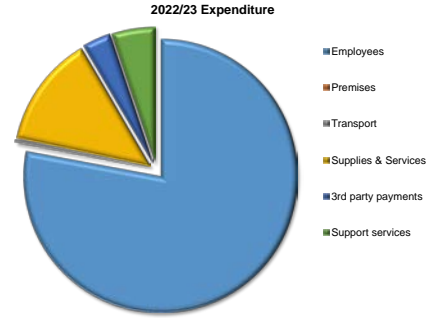
SLLP passed its ISO inspection with no non compliances and several areas of good practice were noted. The whole constitution has been reviewed and updated and the Council has adopted a new code of Conduct based on the LGA model code.

Financial Summary

The Corporate Governance division figures below are inclusive of the South London Legal Partnership (SLLp), though SLLp has a net nil budget overall after recharges to internal and external customers. Three savings (totalling £115k) relating to reducing legal demand which were built in to 2020/21 budgets have not been achieved to date and have been removed from the 2022/23 budget as shown below.

DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	10,964	15,141	11,924	(129)	12,433	12,348	12,378	12,409
Employees	8,466	8,650	9,376	(176)	9,690	9,691	9,692	9,692
Premises	5	31	5	11	5	5	5	5
Transport	43	9	43	(30)	43	44	44	45
Supplies & Services	1,470	5,228	1,462	63	1,641	1,549	1,572	1,595
3rd party payments	402	553	408	2	418	424	430	436
Support services	578	670	631	0	635	635	635	635
Depreciation	0	0	0	0	0	0	0	0
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	10,586	14,727	11,625	206	12,259	12,264	12,264	12,264
Government grants	0	35	13	(104)	13	13	13	13
Reimbursements	485	3,821	130	(299)	130	130	130	130
Customer & client receipts	7,889	8,497	9,142	609	9,776	9,781	9,781	9,781
Recharges	2,212	2,374	2,340	0	2,340	2,340	2,340	2,340
Reserves	0	0	0	0	0	0	0	0
Capital Funded								
Council Funded Net Budget	378	414	300	77	173	84	114	145
Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
		0	0	0	0	0	0	0



Summary of major budget etc. changes

Year	Final Budget	Actual	Budget	Forecast Variance	Budget	Budget	Budget	Budget
2022/23								
2023/24								
2024/25								
2025/26								

2022/23
 Saving 2022-23 CS9 Reduce various AD budget running expenses -£3k
 Saving 2022-23 CS10 Electoral services - reduction in canvass expenses and postage -£15k
 Saving 2022-23 CS12 Delete Head of Information Governance post (£29k saving shown in Corporate Governance and £15k shown in CPI) -£29k
 Reverse saving 2018-19 CS12 SLLp - reduction in legal demand +£50k
 Reverse saving 2019-20 CS14 impose criminal litigation cap at 20k +£20k
 Reverse saving 2019-20 CS15 reduce civil litigation legal support by 50% +£45k

2023/24
 Saving 2022-23 CS11 Increase legal third party income, eg s.106 agreements -£5k
 Re-apply saving 2018-19 CS12 SLLp - reduction in legal demand -£50k
 Re-apply saving 2019-20 CS14 impose criminal litigation cap at 20k -£20k
 Re-apply saving 2019-20 CS15 reduce civil litigation legal support by 50% -£45k

2024/25

2025/26

Service Plan for: Customers, Policy and Improvement

Service Managers: *John Dimmer, Sean Cunniffe and Matt Burrows*

Cabinet Member:

Cllrs Owen Pritchard and Tobin Byers

Overview of the service

Providing strategic and policy direction to shape the vision, we are facilitators, supporters and advocates of change. As a team we ensure connections are made that promote partnership building and collaboration with the voluntary sector, communities, residents, councillors and wider stakeholders to achieve the aims of the council and Merton's ambition. Collectively, we have a diverse mixture of skills, backgrounds, experience, and ways of thinking. We are the glue which sticks the different departments of the organisation together and turns plans into deliverables through a flexible, adaptable, and responsive approach. Our team is in a unique position and we play an important role in horizon scanning both internally and externally. We use the insights we gain to provide positive leadership for change and to get things done! We are also responsible for the first contact with the Council through multi channels providing excellent service to our residents and customers.

Policy, Strategy and Partnerships:

- Develop cross cutting corporate strategies
- Support the council's partnership framework including the Merton Partnership Executive Board, Compact Board and annual meeting of the partnership
- Commission community advice and voluntary sector support services
- Manage the councils performance framework and reporting on the councils performance on Key Performance Indicators (KPIs)
- Provide advice on equalities and preventing terrorism
- Provide policy support to CMT including facilitation of the forward plan

Scrutiny:

- Maintain an independent Scrutiny function, providing advice and support to Councillors as well as officer and partner witnesses

Continuous Improvement:

- Develop and support a Recovery and Modernisation Programme (RMP)
- Support DMTs to embed a culture of continuous improvement within the organisation through the provision of tools, techniques, advice and support
- Ensure change is effectively planned for and managed across the organisation, embedding change management principles and methodology

Communications:

- To develop, own and drive the Council's internal and external narrative among key stakeholder groups and audiences
- To manage delivery of core campaigns to deliver the narrative, as well as communications & engagement improvement via the 2021 Communications & Engagement Strategy

Customer Contact:

- Through Merton Link provide a first point of contact for most council customers and visitors, both face-to-face and by the telephone, ensuring first contact resolution wherever possible or signpost to the most appropriate team
- Provide a high quality contact service, regardless of channel used, wherever possible using a 24/7, 365 days a year digital solution
- Deliver the statutory Registration Service for Births, Deaths and Marriages while also marketing and maximising the income generation at Morden Park House.
- Procure and deliver a hosted, outsourced Translation Service
- Discharge the Concessionary Travel Scheme and review mechanism
- Act as a client for the multi-Borough Coronial Service

Merton's ambitions

Support our most vulnerable residents of all ages
 Maintain a clean and safe environment
 Create a great place to grow up and live in
 Build resilient communities
 Bridge the gap and reduce inequalities
 Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p>Customers: All Council departments & Senior Officers, CMT, Councillors, Statutory Partners, Voluntary and Community Sector Groups, sub-regional and pan London networks. Service delivery feedback is taken from: Annual Councillor Scrutiny survey, Residents Perception Survey & Bi-annual Merton Partnership Executive Awayday.</p>	<p>The Your Merton engagement has delivered insight from residents, partners and wider stakeholders through a borough wide engagement approach, including a Residents Perception Survey; which will improve the use of data in Merton to drive informed decision making</p> <p>Merton Partnership performance data (Thematics)</p> <p>Annual funding database</p> <p>For commissioning/recommissioning: evidence of service provision/demand; service user feedback; wider needs data e.g. JSNA</p> <p>BREXIT preparations driven by stats from central government on the EUSS (EU Settlement Scheme) take-up</p>	<p>Brexit regulations and legislation; pan-London and sub-regional VCS (Voluntary & Community Sector) funding policy changes; PREVENT regulations and related anti-terrorism policy updates</p>	<p>The joint team works collaboratively across all parts of Policy, Strategy and Partnerships, Scrutiny and Continuous Improvement to lead the Recovery and Modernisation programme. They drive the development of key projects that shape the council's future direction, including creating the conditions for mobile and remote working practice, a strategic long-term place based ambition; and an integrated, strength base approach to early intervention practice.</p>

Where are we now?		
Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Manage the workstreams implementing the recommendations from the Internal Review and LGA Peer Challenge. Provide programme, project and policy support to the workstreams.	Recovery and modernisation programme well established with key projects under delivery. Development of a strategic ambition and priorities is nearing completion, with Cabinet sign off in January 2022.	Carry forward
Ensuring the council is aware of the key risks arising from the UK's departure from the EU and that mitigating actions are in place. To play our part in the regional planning for Brexit working with London Councils and The Ministry of Housing, Communities and Local Governments (MHCLG).	Monitoring of immigration support for Merton residents who have not achieved settled status.	Carry forward
To build on the recommendations of the review carried out by the Centre for Public Scrutiny in order to improve effectiveness and impact of the scrutiny function and to engage all non-executive councillors in scrutiny activities. The action plan will be developed by a cross party councillor working group and agreed by the Overview and Scrutiny Commission and reviewed each year when it receives the Annual Member Survey. Increase public involvement and use of external expert witnesses.	Continuing to implement new and innovative ways to develop the Scrutiny function as part of delivering the Improvement Action Plan.	Carry forward
Redesign of Merton Link. Implement the redesign of Merton Link to improve the customer experience and increase self-service.	Outline design principles explored and indicative costings given. Clear that requirements were too costly to implement and would not have been fit for purpose given lessons learned during pandemic. Adapt a differing approach and utilise experiences and actions of neighbouring boroughs and align with the review of office accommodation within the Civic Centre (strand 3 of the project)	Carry forward

How will we get there?

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
<i>Develop a future ambition for Merton setting out priorities, principles and a clear set of plans for delivery</i>	Support our most vulnerable residents of all ages
	Bridge the gap and reduce inequalities
	Create a great place to grow up and live in
	Maintain a clean and safe environment
	Build resilient communities
	Continuously improve

Performance Measures									
Indicator	2020 /21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									

Projects / key activities to support the objective *(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)*

Project / activity name	Description	Proposed start date	Proposed end date
<i>Project / activity 1</i>	Produce a clear place-based future ambition for Merton, based on robust and transparent engagement with communities, partners, staff & wider stakeholders.		<i>Jul-22</i>
<i>Project / activity 2</i>	Develop an evidence led approach to data and intelligence that supports delivery of Merton the Place ambition; and drives a culture of evidence based decision making		<i>Jul-22</i>
<i>Project / activity 3</i>	Develop plans to delivery this ambition and monitor delivery.		<i>Jul-22</i>

Potential barriers to achieving objective

Description of barrier	Mitigating Actions
<i>Ambition and priorities are not adopted by Cabinet</i>	<i>Draft Ambition and priorities shared with LSG and CMT for comment</i>
<i>Financial pressures on the council and its partners to deliver</i>	<i>Performance monitoring to CMT</i>

Impact on the customer/end user

Transparent priority setting through a clear and engaged identification of Merton's ambition

Partners / interdependencies

All departments across the council need to embrace the opportunity to shape and develop the ambition; Partner organisations and wider stakeholders have contributed to the development of the ambition through various routes of engagement as part of the conversation.

Service Objective 2				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
<i>Develop a collaborative approach to building long term strength based community resilience that uses learning from the COVID-19 response and embeds strategic system-led decision making</i>				Build resilient communities					
				Support our most vulnerable residents of all ages					
				Bridge the gap and reduce inequalities					
Performance Measures									
Indicator	2020 /21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of volunteers recruited through MVSC	1211	Green	367	385	404	424	445	Quarterly	High
Projects / key activities to support the objective <i>(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)</i>									
Project / activity name	Description					Proposed start date		Proposed end date	
<i>Project / activity 1</i>	Merton Partnership governance review to streamline reporting and strengthen system-led priority setting					Apr-21		Oct-22	
<i>Project / activity 2</i>	Develop a strength-based commissioning model for preventative services that builds on evidence and intelligence from the community response hub model					Jan-22		Mar-23	
<i>Project / activity 3</i>	Support community capacity building through facilitation of the Strategic Partners Programme - Infrastructure Support and Information and Advice elements					Mar-22		Mar-23	
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
<i>Capacity and strengths of the VCS to respond to the preventative model</i>					<i>State of the sector mapping as part of the design phase</i>				
					<i>Performance monitoring of current funding agreements for pressure points and risks</i>				
<i>Financial challenge to Year 3 SPP funding</i>					<i>Financial planning and cost analysis</i>				
Impact on the customer/end user									
<i>Streamlined services that provide clear access to early intervention models delivered from within the community</i>									
Partners / interdependencies									
<i>Departmental commissioners and grant funders (minimum of Adults, Children's, Public Health and Housing); dependency on partnership funding to commission state of the sector report</i>									
Service Objective 3				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
<i>Lead an effective and adaptable Scrutiny function that promotes and underpins service improvements that matter to local people. Using a range of methods that support strong collaboration with officers and partners and drives a focus on impact.</i>				Continuously improve					
				Bridge the gap and reduce inequalities					
				Create a great place to grow up and live in					
Performance Measures									
Indicator	2020 /21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% Councillors who agree scrutiny function is effective	64%	Red	75%	75%	80%	80%	80%	Annually	High

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Project / activity 1	Continuing to implement the improvement action plan with a renewed focus on governance and outcome focused task groups						Ongoing	end March 2023	
Project / activity 2	Exploring new delivery models and use of technology to build a portfolio of techniques to support effective scrutiny panels and task groups						Ongoing	end March 2023	
Project / activity 3	Refreshing and raising the external profile of Scrutiny to increase local knowledge, engagement and interaction with residents, partners and stakeholders including through the inductino programme for new Members						Ongoing	end March 2023	
Potential barriers to achieving objective									
Description of barrier					Mitigating Actions				
Impact of reduced scrutiny resources					Embed scrutiny within wider policy team exploit synergies and provide support to scrutiny officers				
Demand for additional scrutiny activities in light of financial pressures									
Lack of engagement by partners, officers and stakeholders					Revitalise external scrutiny protocol and raise positive profile with partners				
Impact on the customer/end user									
That scrutiny work programmes reflect the concerns of the public and work undertaken in the Commission, Panels and task group reviews can demonstrate tangible outcomes and improved services for local									
Partners / interdependencies									
All departments, partners and wider stakeholders being called to present or as witnesses to in-depth inquiries; all Councillors including Cabinet.									
Service Objective 4				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Lead the council's modernisation programme, building on evidence and feedback to establish effective new ways of working; managing delivery through clear project management and evidential staff engagement and participation.				Continuously improve					
Performance Measures									
Indicator	2020 /21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Project / activity 1	Develop and embed hybrid working as part of the organisation's long-term business operating model						Ongoing	Mar-23	
Project / activity 2	Explore options and develop proof of concepts to digitally enhance and redesign end to end service delivery across key customer facing services						Ongoing	Mar-23	
Project / activity 3	Redesign approach to passenger transport						Ongoing	Sep-22	
Potential barriers to achieving objective									

<i>Description of barrier</i>				<i>Mitigating Actions</i>					
Staff changes/turnover resulting in lack of continuity, skills and organisational intelligence				Reduce number of fixed term posts and embed function with joint Policy & Improvement Team					
Project capacity				Weekly team catchups and monitoring/alignment of tasks and deadlines through a team dashboard					
Organisational understanding of and capacity to respond to the projects effectively				Clear communication and engagement plan for staff					
Impact on the customer/end user									
Delivery of a modernisation programme that fully supports and enables the council to work effectively and efficiently into the immediate future.									
Partners / interdependencies									
All departments and staff across the council will need to embrace the opportunities presented by the modernisation programme. Particular dependencies for delivery are with HR & ICT.									
Service Objective 5				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the					
To deliver an updated communications & engagement strategy, in order to align communications to council priorities, deliver a consistent narrative, and deliver internal change				Continuously improve					
Performance Measures									
Indicator	2020 /21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% of positive and neutral media coverage	94.71%	Green	75%	75%	75%	75%		Monthly	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	
Project / activity 1	Deliver Comms Strategy proposal in first quarter 2021					ongoing		ongoing	
Potential barriers to achieving objective									
<i>Description of barrier</i>				<i>Mitigating Actions</i>					
Impact on the customer/end user									
Partners / interdependencies									
Service Objective 6				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the					
To continue to deliver public health communications & engagement in line with emerging trends, data and announcements, as part of Keep Merton Safe				Support our most vulnerable residents of all ages					
Performance Measures									
Indicator	2020 /21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity

n/a										
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Project / activity 1</i>	Monthly CMT evaluation report						ongoing		ongoing	
<i>Project / activity 2</i>	Alignment with London communications standards						ongoing		ongoing	
<i>Project / activity 3</i>										
Potential barriers to achieving objective										
<i>Description of barrier</i>						<i>Mitigating Actions</i>				
Impact on the customer/end user										
Partners / interdependencies										
Service Objective 7										
<i>Customer Contact</i>						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the				
						Continuously improve				
Performance Measures										
Indicator	2020 /21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
First contact resolution (Merton Link)	97.61%	Green	75%	76%	77%	78%		Monthly	High	
Income from Registrars' events	£397,559	Amber	400,000	400,000	400,000	400,000		Monthly	High	
Digital take up (CRM services)	73.32%	Green	61%	63%	65%	67%		Monthly	High	
Ease of use of website - %	53.26%	Green	46%	47%	48%	49%		Monthly	High	
Appointment availability of Registration Services	100%	Green	95%	95%	95%	95%		Monthly	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Merton's Translation Service</i>	Move to an outsourced solution offering a better and more accessible service						2021		Jun-22	
<i>Registration Services</i>	Explore the potential to increase the venue offering and market to become the best wedding venue in South London.						Nov-21		Mar-22	
<i>Concessionary Travel</i>	Review to digitilise the offering and improve the customer experience.						Feb-22		Sep-22	
Potential barriers to achieving objective										
<i>Description of barrier</i>						<i>Mitigating Actions</i>				
Impact on the customer/end user										
Partners / interdependencies										

Service Objective 8			Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the						
<i>Increased efficiency in complaints handling and response</i>			Select						
Performance Measures									
Indicator	2020 /21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% of Complaints dealt with in time	75.51%	Red	90%	90%	90%	90%	90%	Monthly	High
% of Complaints progressed to Stage 2	11.57%	Red	9%	9%	9%	9%	9%	Quarterly	Low
% of Ombudsman investigations answered in time	69.23%	Red	90%	90%	90%	90%	90%	Quarterly	High
% of Ombudsman contact answered in time	95.83%	Green	90%	90%	90%	90%	90%	Monthly	High
% of Ombudsman complaints partially or fully upheld	26.00%	Green	60%	60%	60%	60%	60%	Quarterly	Low
Projects / key activities to support the objective <i>(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)</i>									
Project / activity name	Description						Proposed start date		Proposed end date
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
Impact on the customer/end user									
Partners / interdependencies									

People

HR input and support is a key dependency for delivery of this service plan, with particular focus on outcome 4 and the modernisation programme.

Technology

ICT input and support is a key dependency for delivery of this service plan, with particular focus on outcome 4 and the modernisation programme.

Service improvement

Continuous improvement is a key theme throughout this service plan. The team continues to work from the corporate centre to support and challenge the organisation and its departments to deliver ongoing improvements through the objectives detailed in the delivery plan.

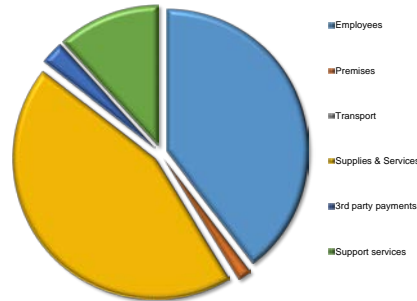
Financial Summary

The CPI division has multiple savings built in to the MTFS over the next 2 years, as detailed below. The financial performance of the division has been impacted by Covid-19 in recent years, particularly in the Registrars Service. Recovery in the division has been strong, though there could be a negative impact again depending on the how the situation with the latest covid variant, Omicron, develops and any possible restrictions re-introduced as a result.

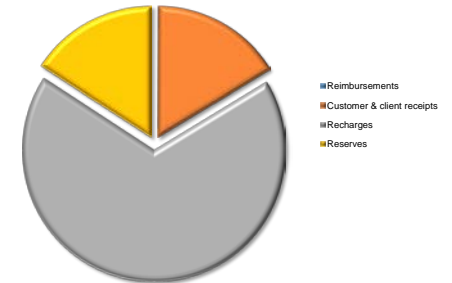
DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	5,397	5,939	6,058	(124)	6,162	6,137	6,184	6,233
Employees	2,345	2,255	2,312	(1)	2,443	2,393	2,393	2,393
Premises	117	82	94	127	97	98	99	101
Transport	1		1	(1)	2	2	2	2
Supplies & Services	1,995	2,889	2,732	(53)	2,731	2,751	2,795	2,839
3rd party payments	233		195	(195)	167	169	172	175
Support services	705	713	724	0	724	724	724	724
Depreciation								
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	4,359	5,053	4,071	(2)	4,267	5,252	5,252	5,252
Government grants	0	42	0	(19)	0	0	0	0
Reimbursements	3	178	3	3	3	3	3	3
Customer & client receipts	982	449	982	14	1,014	1,014	1,014	1,014
Recharges	3,571	4,384	4,234		4,234	4,234	4,234	4,234
Reserves	(198)		(1,148)		(985)	0	0	0
Capital Funded								
Council Funded Net Budget	1,038	886	1,987	(125)	1,895	885	933	981

2022/23 Expenditure



2022/23 Income



Summary of major budget etc. changes

Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Customer Contact Programme		0	150	0	1,226	1,000	100	1,000
	0	0	150	0	1,226	1,000	100	1,000

2022/23

Saving 2019-20 CS04 Reduce strategic partner grant by 10% -£78k
 Saving 2019-20 CS28 cash collection reduction -£13k
 Saving 2020-21 CS7 Staff reductions -£75k
 Saving 2022-23 CS5 Increase income budget in Registrars service -£32k
 Saving 2022-23 CS6 Reduction in cash collection costs -£20k
 Saving 2022-23 CS8 Delete Head of Information Governance post (£29k saving shown in Corporate Governance and £15k shown in CPI) -£15k

2023/24

Saving 2018-19 CS15 Policy and Partnership - Reduce headcount by 1fte -£50k
 Saving 2022-23 CS7 Rationalisation of Merton Link budgets -£20k

2024/25

2025/26

Service Plan for : Human Resources

Service Manager: *Liz Hammond* Cabinet Member: *Cllr. Tobin Byers*

Overview of the service

The HR Service's objective is to ensure that:

- There is an agile workforce, which is responsive to changing needs
- Managers are able to manage remote teams and are sensitive to the needs of all individuals in the team
- The workforce is representative of and sensitive to the community which it serves
- HR policies are clear and consistent, and are focussed on a manager-led approach to managing staff issues

We will achieve this by ensuring that we can attract and retain the very best talent, that we can grow and develop internally the skills that we need by maximising the apprenticeship levy and encourage our staff to grow and develop and progress within the organisation. The HR Service aims to provide the strategic advice and support that Merton needs in order to meet its objectives.

Merton's ambitions

Support our most vulnerable residents of all ages
 Maintain a clean and safe environment
 Create a great place to grow up and live in
 Build resilient communities
 Bridge the gap and reduce inequalities
 Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p>70 of the most senior managers were surveyed in July 2020 in order to influence the HR Operating model review. The work on this was put on hold pending the retirement of the CEO and recruitment of a new CEO. This work will resume once the new CEO has reviewed their senior team structure.</p> <p>The Workforce Strategy was reviewed in June 2020 as a result of the pandemic as an element of how we deliver has clearly been impacted by the pandemic. As an example, all face to face training had to stop with immediate effect and move to online and we have quickly had to adapt our advice and guidance for the large majority of staff who are now home working and will be for the foreseeable future. This included survey results, consultations, complaints/compliments and set how the way in which you are planning to deliver your service reflects feedback from customers/service users. The current workforce strategy is due for renewal in December 2021 and CMT have received a paper with a proposed bottom up approach which they have agreed</p>	<p>Black Lives Matters and the COVID related issues have shown that B.A.M.E staff are at higher risk of COVID and this has focused our need for enhanced data and intelligence on our B.A.M.E staff workforce. Equality and diversity monitoring across all the main protected characteristics have been increased, culminating in an Annual Equalities and Diversity in Employment Report which is now run annually and which focuses on all protected characteristics. The REN Staff forum are a key source of intelligence for the HR team concerning policy reviews, training, Staff Pulse survey on RACE and many other initiatives that we seek their support and guidance on. The bi-annual staff survey ran in December 2020 which was enhanced with equality questions. The survey responses are broken down into all the equality strands and the Equalities Steering Group will be responsible, together with the REN staff forum, for designing an action plan that addresses and responds to any key themes arising. CMT are regularly updated with progress on all actions. Merton is also part of the WRFS pilot which</p>	<p>COVID 19 has clearly impacted on our ability to deliver face to face training with the majority of training now being delivered online. We have also had to continually keep updating all our COVID related guidance as the pandemic and the Government's approach to it has changed. We have also had to put in place a lot of guidance and support for Managers and staff who are now predominately home working. Health and wellbeing has been prioritised. We are currently working with external consultants to help us redesign our workplace setting to accommodate a hybrid working approach that is now very much embedded as the future way of working across the UK.</p>	<p>HR are contributing to and/or leading on a number of workstreams that support our desire to be London's Best Council. Hybrid Working, new Workforce Strategy, Apprenticeship Strategy, revised HR Operating Model. We are also in the process of changing our iTrent and payroll provider which enables us to utilise new and enhanced functionality in iTrent. Streamlining processes, enhanced self-service and a new Learning Management System. We will also be implementing a new on line appraisal process with an embedded link to enabling Merton to enhance and grow its talent. HR has been a team that has continually been looked to for advice and to lead the way on supporting the council's COVID response and our recovery as we move into a new RAI working environment</p>

proposed bottom up approach which they have agreed. This will include engagement with DMT's and the wider Leadership Group. Directors will be accountable for leading on a part of the strategy and running focus groups with staff in order to enable a staff led approach to designing the new strategy. The aim is for the new strategy to go live in April 2022.

The key customers of the service are the Directorates of the Council, the Members and Merton Schools. EIA assessments are undertaken at all appropriate times.

actions. Merton is also part of the WRLES pilot which focuses on race equality within the social care workforce. In December 2021 we are running an ED&I survey, which whilst incorporating the broader view of protected characteristics has a heavy weighting towards RACE. Results will be available by January 2022 and will provide us with important insight and intelligence on inclusion within the Council. We also rely heavily on data to monitor the impact of COVID on the workforce, provide senior management with intelligence and analysis of trends in workforce health and wellbeing, the impact of training and training needs and the data from customer insight in how to design our service offering. All of this intelligence has influenced the support and training provided to staff around mental and physical health and will influence the design of our new Workforce Strategy.

and working environment.

Where are we now?		
Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Developing Our Talent - this includes Induction, Being a Manager in Merton training, New Appraisal process, Procurement frameworks for Apprenticeship, Essential Skills training, Adult Social Care training, Kickstart, Embedding talent management and succession planning. Schools L3 cohort	Excellent progress has been made in putting in place procurement frameworks for Apprenticeships, Essential Skills training and Adult Social Care and this work is complete. Induction has been reviewed and is now an on line training course and we also have revised the New Managers Induction. We have successfully recruited 27 new Kickstarts with a view to having 40 by the time the initiative closes. The paper appraisal process was reviewed and rolled out in April 21 and we aim to have a new on line appraisal process in place in readiness for April 2023. This will link with the work on Talent management and succession planning. Work on developing our talent will be a recurring theme in the 2022/23 service plan	Carry forward
Member Development	A lot of work has been undertaken towards member development but we have an election next year and we will be continuing to prepare for new members coming on board and therefore this will remain an ongoing objective	Carry forward
Health and Wellbeing	All activities in last year's plan have been achieved (with the exception of the accreditation for the London Healthy Workplace Charter). However health and wellbeing plays a major part within our strategy moving forward and therefore remains an ongoing objective.	Carry forward

Remote Working	All the activities in last years' service plan have been delivered but we are now embedding Hybrid working as a permanent way of working moving forward and therefore will be an ongoing action for 2022/23 Service Plan	Carry forward
Equalities and Diversity	We have implemented the Annual Equalities in Employment Report. We are participating in the WRES pilot and have now submitted two data returns and an action plan. We have in place a Black Lives Action plan that is being progressed and monitored through the Equality Steering Group. We are in the process of conducting an ED&I survey which will provide valuable intelligence to the type of anti-racism training we being into Merton. We will have launched in January 2022 Bystander training for all staff. The mutual mentoring programme will also commence once the survey results have been received as these will also benefit the mutual mentoring programme roll out.	Carry forward

How will we get there?

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
<i>The performance measures below are corporate as opposed to measuring HR performance. Therefore Service Objective 1 has been left deliberately blank and service objectives will commence at no. 2 below.</i>	Continuously improve

Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
No. of working days per FTE lost to sickness absence excluding schools	8.04	Red	7	7	7	7		Quarterly	Low
Length of time from Job being advertised to offer being made (REVISED SCOPE)	37.6 days	Green	45 days	45 days	45 days	45 days		Monthly	Low
Completion of all performance appraisals	71%	Red	100%	100%	100%	100%		Annually	High
Voluntary turnover rate (the rate of resignations)	5.26%	Green	12%	12%	12%	12%		Quarterly	Low
No. of Apprentices excluding schools (Govt Apprenticeship Levy Scheme)	5	Red	60	60	60	60		Quarterly	High
No. of Apprentices in schools (Govt Apprenticeship Levy Scheme)	13	Red	30	30	30	30		Quarterly	High

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)			
Project / activity name	Description	Proposed start date	Proposed end date
<i>Project / activity 1</i>			

Potential barriers to achieving objective	
Description of barrier	Mitigating Actions
<i>Many of these indicators are corporate indicators for Merton Council and are not owned by HR</i>	<i>Regular report on indicators and review at CMT</i>

Impact on the customer/end user

Partners / interdependencies

Service Objective 2				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Developing our Talent (this links to and forms part of the Workforce Strategy action plan)				Bridge the gap and reduce inequalities					
				Continuously improve					
Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Retention of staff who score 4 in their performance review - therefore indicated as a high performer	To be measured from 22/23		No target as not an indicator in 20/21	75%	75%	75%	75%	Annually	
Reduction of Apprenticeship levy underspend	£415,571		No target as not an indicator in 20/21	£300,000	£100,000	£50,000	£0		
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date		Proposed end date
Project / activity 1	New Online Appraisal Process						Apr-22		Apr-23
Project/activity 2	Embed our Apprenticeship Strategy and increase take up of Apprenticeships and thus maximising our Apprenticeship levy						Jan-22		Mar-23
Project / activity 3	Develop and Embed Talent Management programme						Apr-22		Mar-23
Project / activity 4	Develop and Embed Succession Planning Programme						Apr-22		Mar-23
Project/activity 5	Design and roll out of the Workforce Strategy Action Plan for 2022 to 2025						Jan-22		May-22
Potential barriers to achieving objective									
<i>Description of barrier</i>						<i>Mitigating Actions</i>			
<i>Managers who do not engage with the talent management and succession planning frameworks and do not actively try to support and bring on their staff</i>						<i>Pending reintroduction of appraisals</i>			
<i>insufficient funding to recruit supernumerary apprentices into the business to support long term succession planning goals</i>						<i>CMT paper</i>			
Impact on the customer/end user									
Partners / interdependencies									
Service Objective 3				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Members Development (this links to and forms part of the Workforce Strategy action plan)				Continuously improve					
				Support our most vulnerable residents of all ages					
				Build resilient communities					

Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
80% of Members attendance at mandatory training (Local Indicator)	Not baseline during this year	Not Yet Known	80%	80%	80%	80%	80%	Annually	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	
Project / activity 1	Develop Members Training Programme & Material for remainder of 22-23					Dec-21		Jul-22	
Project / activity 2	Deliver Members Training Programme & Material for remainder of 22-23					Dec-21		Jul-22	
Project / activity 3	Deliver "Being a Councillor" engagement programme and events					Jan-22		Apr-23	
Project / activity 4	Develop Members Training Programme & Material for 2022 Cohort					Dec-22		Mar-23	
Project / activity 5	Deliver Monthly Newsletters promoting Members Training and Business updates					May-22		Ongoing	
Potential barriers to achieving objective									
Description of barrier					Mitigating Actions				
Despite providing a comprehensive list of training that members have identified that they need there is still a poor take up of training on offer					Online training offer will provide members with more flexibility of when then can complete mandatory training				
L&D budget (i.e. average £100 pp / pa) limits the capacity to procure external trainers and encourage participation on paid for events					Move to more online learning to train more people for the same budget				
Impact on the customer/end user									
Partners / interdependencies									
Service Objective 4					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				
Health and Wellbeing (this links to and is part of the Workforce Strategy Action plan)					Bridge the gap and reduce inequalities				
					Continuously improve				
					Build resilient communities				
Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Completion of bi-annual staff survey	48%		n/a	56%	n/a	60%	n/a	Biennially	High
Reduction in mental health absence in terms of working days lost per FTE (this includes stress, depression, anxiety and other mental health categorisations)	2.55		n/a	2.50	2.40	2.30	2.20	Quarterly	Low

Accreditation against the Healthy Workplace charter	No measurement for this year			Foundation	Achievement	Excellence	TBC	Annually	Yes/No
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	
Project / activity 1	Develop Training timetable of MHFA/MHFA awareness for managers					Nov-21		May-22	
Project / activity 2	Continue to support Network Group of Trained MHFA Network support for staff					Jan-22		May-22	
Project / activity 3	Develop and manage Cohort of Trained First Aiders					Nov-20		Ongoing	
Project/activity 4	Achieve Foundation level of the London Healthy Workplace Charter					Apr-22		Mar-23	
Project/activity 5	Create a network of "Wellbeing Champions" and actively support their development and activity					Dec-21		ongoing	
Project/activity 6	Create a specific Health & Wellbeing strand for the new Workforce strategy					Dec-21		ongoing	
Project/activity 7	deliver "wellbeing Mondays" available to all staff on a wide range of wellbeing topics					Dec-21		ongoing	
Project/activity 8	Purchase new eLearning catalogue focussed on health & wellbeing resources					Dec-21		May-22	
Project/activity 9	Staff who are unwell are actively referred to occupational health					Dec-21		ongoing	
Project/activity 10	Revitalisation of the promotion of Employee Assistance Programme and associated benefits					Apr-22		ongoing	
Project/activity 11	Reduction in wait times for staff referred to occupational health, so that employees are seen quicker and can return to work earlier. This will also reduce the length of time it takes for new starters to be cleared to start.					Apr-22		Ongoing	
Project/activity 12	Refresher training sessions for managers on the OH and EAP referral processes, so that managers feel self-sufficient to be able to refer their own staff.					Apr-22		Ongoing	
Project/activity 13	Creation of quarterly reporting on OH and EAP to be sent to Directors/AD's so they are more aware of what is happening throughout the organisation.					Apr-22		Ongoing	
Project / activity 14	Continued promotion of Flu Vaccination programme					Annually		Annually	
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
Despite our best endeavours staff not engaging with the help and support that they are being provided with					Staff engagement				
Impact on the customer/end user									
Partners / interdependencies									
Service Objective 5					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				
Hybrid Working					Bridge the gap and reduce inequalities				
					Continuously improve				
					Select				
Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity

Engagement with the Remote Working pulse survey		Not Yet Known	50%	50%	50%	50%	50%	Annually	High
Continued lower level of sickness than pre-covid	Pre covid 9.3 working days lost per FTE		8.5	8.5	9.0	9.0	9.0	Annually	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date			Proposed end date
<i>Project / activity 1</i>	Continued updating of material on the HUB to support Managers and Staff to manage Hybrid Working					<i>Ongoing</i>			<i>Ongoing</i>
<i>Project / activity 2</i>	Continued roll out of Purplephish Training to help reduce our vulnerability to Cyber Attacks					<i>Ongoing</i>			<i>Ongoing</i>
<i>Project / activity 3</i>	Continued roll out of health and wellbeing support initiatives					<i>Ongoing</i>			<i>Ongoing</i>
<i>Project / activity 4</i>	Creation and implementation of the "Being a Manager in Merton" initiative for all managers					<i>Ongoing</i>			<i>Ongoing</i>
<i>Project / activity 6</i>	Procure and deliver a specific eLearning "future of work" catalogue with a range of specifically designed tools to help staff and managers work in this new hybrid world					<i>Dec-21</i>			<i>Ongoing</i>
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
<i>Managers who fail to manage remote teams well and do not respond to training interventions</i>					<i>CMT paper to propose management objective concerning management of remote teams</i>				
Impact on the customer/end user									
Partners / interdependencies									
Service Objective 6									
					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				
Equalities Diversity and Inclusion					Bridge the gap and reduce inequalities				
					Continuously improve				
					Build resilient communities				
Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Equality & Diversity in Employment Report	Produced annually in May each year	Not Yet Known	100%	100%	100%	100%	100%	Annually	High
									High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date			Proposed end date
<i>Project / activity 1</i>	Continue to produce the Annual Equalities and Diversity in Employment Report					<i>May - annually</i>			<i>Annually</i>
<i>Project / activity 2</i>	Adoption of the WRES Standards (reported in the above report)					<i>Ongoing</i>			<i>Ongoing</i>
<i>Project / activity 3</i>	The development of an up to date and fit for purpose ED&I Action Plan					<i>Jan-21</i>			<i>Ongoing</i>

<i>Project / activity 4</i>	Continuation of the Policy Review (prioritised to those policies which could impact disproportionately on BAME staff)						<i>Jan-21</i>	<i>Dec-22</i>	
<i>Priority/activity 5</i>	Undertake a Merton-wide Equality, Diversity & Inclusivity people survey, analyse its results and develop a series of appropriate training						<i>Dec-21</i>	<i>Aug-22</i>	
<i>Project / activity 6</i>	Commission a programme of CMT-led anti-racist/anti-discriminatory education for the Council - e.g. Bringing in the Bystander Training						<i>Jan-22</i>	<i>Aug-22</i>	
<i>Project / activity 6</i>	Develop cohort of mutual mentors and mentees and deliver training programme with senior leaders						<i>Jan-22</i>	<i>Ongoing</i>	
<i>Project / activity 7</i>									
Potential barriers to achieving objective									
<i>Description of barrier</i>						<i>Mitigating Actions</i>			
<i>Some individuals perceive there is racism present within Merton</i>						<i>Staff engagement</i>			
Impact on the customer/end user									
Partners / interdependencies									
Service Objective 7									
						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions			
<i>HR Operating Model</i>						Continuously improve			
Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	
<i>Project / activity 1</i>	Deliver an HR Structure that is fit for purpose for the next 3 - 5 years					<i>Apr-22</i>		<i>Sep-22</i>	
<i>Project / activity 2</i>	Deliver proposals for a new HR Operating Model; Provide CMT options paper					<i>Apr-22</i>		<i>Sep-22</i>	
<i>Project / activity 3</i>	Deliver a new HR Operating Model; Conclude Implementation of recommendations					<i>Apr-22</i>		<i>Sep-22</i>	
<i>Project/activity 4</i>	Review Merton's branding and recruitment and attraction strategies to enable us to attract hard to recruit and scarce skills to Merton, together with maximising potential talent					<i>Apr-22</i>		<i>Dec-22</i>	
Potential barriers to achieving objective									
<i>Description of barrier</i>						<i>Mitigating Actions</i>			
<i>CMT need to decide what the HR Operating Model will be</i>						<i>Pending CMT decision</i>			
Impact on the customer/end user									
Partners / interdependencies									

Service Objective 8				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
Mandatory Learning				Continuously improve						
				Statutory requirement						
				Maintain a clean and safe environment						
Performance Measures										
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency		Polarity
90% of staff with access to computers undertake the learning (allowances for absence)	To be measured from 22/23		No target as not an indicator in 20/21	90%	90%	90%	90%	Quarterly		
								Select		Select
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Project / activity 1	Create a corporate mandatory learning strategy supported by CMT						May-22		ongoing	
Project / activity 2	create a programme of quarterly mandatory modules						Jun-22		Jul-22	
Project / activity 3	launch the quarterly programme						Oct-22		ongoing	
Potential barriers to achieving objective										
Description of barrier						Mitigating Actions				
CMT need to decide what consequences will be for non-completion. lack of consequences could lead to apathy around completion						Pending CMT decision				
Impact on the customer/end user										
Partners / interdependencies										
Service Objective 9				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
Reduction on reliance of Agency workers				Bridge the gap and reduce inequalities						
				Continuously improve						
Performance Measures										
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency		Polarity
Reduction in overall number of agency workers engaged.	400		n/a	360	360	360	360	Quarterly		
										Select

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Project / activity 1	Promotion of Apprenticeship programme as an alternative to agency resource, in particular for administration resources.						Apr-22	Ongoing	
Project / activity 2	Education for managers around different recruitment processes.						Apr-22	Ongoing	
Project / activity 3	Actively promoting and chasing managers for moving temporary staff to permanent contracts.						Apr-22	Ongoing	
Project / activity 4	Promotion of Statement of Works process, which is a new way of paying agency staff upon completion of milestones instead of by hour/daily rate.						Apr-22	Oct-22	
Project / activity 5	Running 'Lunch and Learn' sessions for Statement of Works process, RAF process.						Apr-22	Ongoing	
Project / activity 6	Work with Commensura to create a quarterly report on agency stats that compares the current spend to the spend in the previous year/quarter, to identify areas which have increased agency usage/spend, to send to Directors/AD's.						Apr-22	Ongoing	
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
Unwillingness of line managers to embrace the change in the way they recruit new staff, and the ongoing need to implement the temp to perm policy.						Pending CMT decision			
Impact on the customer/end user									
Partners / interdependencies									
Service Objective 10									
Generate recruitment revenue (look to sell the Comensura service to Merton schools which will increase consistency as well as revenue)						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the			
						Bridge the gap and reduce inequalities			
						Continuously improve			
Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
To have successfully onboarded schools to the Commensura contract (specific target will be determined following engagement with schools during 2022/2023)	£0		tbc	tbc	tbc	tbc		Quarterly	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Project/activity 1	CMT paper to get support to market this service to schools						Apr-22	Sep-22	
Project / activity 2	Work with Comensura to source agencies that recruit staff for schools						Apr-22	Aug-22	
Project / activity 3	Create SLA document and agree cost that schools will be charged for buying in to the service						Apr-22	Aug-22	

<i>Project / activity 4</i>		Create a presentation to take to schools showing the benefits and cost savings that could be achieved by buying in to the Comensura contract					<i>Apr-22</i>		<i>Oct-22</i>	
<i>Project / activity 5</i>		Once schools have agreed to buy in, create an implementation plan to map out the process of 'onboarding' them to the contract. This will include system training and create of user accounts.					<i>Apr-22</i>		<i>Ongoing</i>	
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
<i>Schools not being willing to sign up.</i>					<i>Pending CMT decision</i>					
<i>Not being able to source adequate agencies that will agree to supply.</i>										
Impact on the customer/end user										
Partners / interdependencies										
Service Objective 11					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the					
Workforce Strategy					Continuously improve					
					Bridge the gap and reduce inequalities					
Performance Measures										
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
n/a								Select	Select	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description					Proposed start date		Proposed end date		
<i>Project / activity 1</i>	facilitate working groups across all directorates and staff groups to gather ideas on how the strategy should look and best serve the Merton workforce					<i>Jan-22</i>		<i>Sep-22</i>		
<i>Project / activity 2</i>	Gather feedback and produce consolidated workforce strategy					<i>Jan-22</i>		<i>Sep-22</i>		
<i>Project / activity 3</i>	The workforce strategy creation is merely the beginning of the work. We will therefore create workforce champions and workstream leads responsible for delivery of the various strands of the strategy					<i>Apr-22</i>		<i>ongoing</i>		
<i>Project/activity 4</i>										
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
Impact on the customer/end user										
Partners / interdependencies										

People

In order to deliver on the extensive work programme that HR have to support the delivery of the Workforce Action plan, the response to COVID-19 and the move to remote working and the Modernising Merton programme, HR have asked for the additional support of an Learning and development (L&D) Officer and an L&D Administrator. We also have another L&D Officer interim post that may require to be further extended. In order to deliver the Remote Working element of the Modernising Merton programme we will provide extensive tools and guidance to be made available on a dedicated page on the HUB, together with support and training for Managers in managing remote teams. The Workforce Strategy action plan has been reviewed and updated to take into account the changes in service delivery that have been brought about by the rapid move to Remote/Home working as a result of the COVID-19 pandemic. The HR Operating Model has also been reviewed with initial proposals ready for presentation to CMT.

Technology

IT are actively supporting the work of the payroll move to iTrent provided by Midland HR and the introduction of a new LMS system. They will also provide any technical support that may be required as we move to an on line appraisal system.

Service improvement

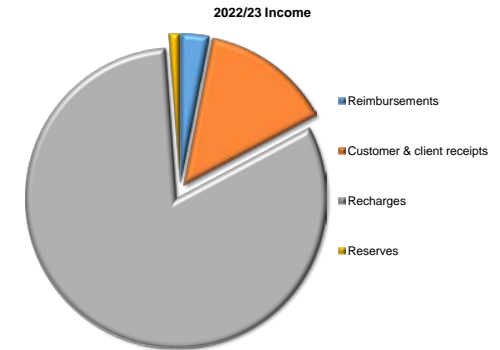
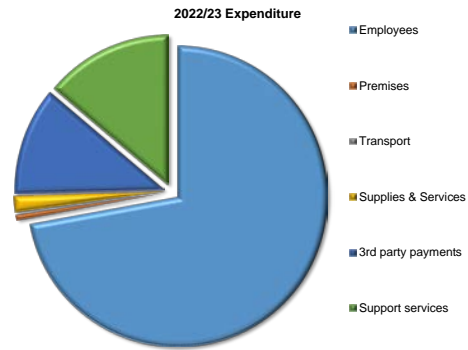
HR will be reviewing their HR Operating model during 2022 and if it remains in-house (accepting that payroll, iTrent and DBS are all currently outsourced at the moment), would like to grow the commercial model already in place with 52 Schools and some charities who already purchase HR services as satisfied customers. The plan would be to expand the client base and bring in a modest income into the Council. The process that requires the most improvement is the Appraisal process which is currently paper based and very resource intensive to administer. It is proposed that this process will be automated through an on-line appraisal software which will be live and ready from April 23.

Financial Summary

Financial pressure within the HR division is predominantly around the use of interim staff and the shared Trent service, though this is expected to reduce from 2022/23 onwards with the introduction of a new contract for the Trent system.

DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	2,841	3,047	2,734	234	2,812	2,750	2,758	2,765
Employees	1,970	2,196	2,023	143	2,028	2,031	2,034	2,037
Premises	16	7	16	0	16	17	17	17
Transport	4	2	4	(1)	5	5	5	5
Supplies & Services	49	110	52	74	48	49	50	50
3rd party payments	364	268	249	18	325	259	263	266
Support services	438	464	390		390	390	390	390
Depreciation								
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	2,768	3,163	2,734	(10)	2,744	2,743	2,743	2,743
Government grants	0	7	0	(3)	0	0	0	0
Reimbursements	87	101	87	(13)	87	87	87	87
Customer & client receipts	386	390	386	6	396	396	396	396
Recharges	2,447	2,665	2,293	0	2,293	2,283	2,293	2,293
Reserves	(152)		(32)	0	(33)	(33)	(33)	(33)
Capital Funded								
Council Funded Net Budget	73	(116)	0	224	69	7	15	22
Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
		0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0



Summary of major budget etc. changes

2022/23

Saving 2022-23 CS4 Increased schools payroll buy-back income and reduced payroll postage spend -£15k
Reverse saving 2019-20 CS26 Review of contract arrangements +£70k

2023/24

Re-apply saving 2019-20 CS26 Review of contract arrangements -£70k

2024/25

2025/26

Service Plan for : Infrastructure and Technology

Service Manager:

Mark Humphries - Assistant Director Infrastructure & Technology

Cabinet Member:

CLlr Tobin Byers & CLlr Owen Pritchard

Overview of the service

Infrastructure & Technology Division (I&T) is made up of seven functions:

IT Service Delivery - IT (SD) supports the Councils operations by providing IT infrastructure, desktop equipment and associated software. Fixed and mobile telecommunications, Service Desk facility, IT Disaster Recovery and Business Continuity arrangements together with IT governance and data security.

IT Business Systems - IT (BS) works with the organisation to establish and deliver the IT strategy and associated implementation plan, ensure a coordinated and planned approach for the implementation and support of technology whilst complying with the agreed corporate IT strategy and standards to support business efficiency and improve service delivery.

Facilities Management - FM provides the infrastructure to deliver services through accommodation, building repairs and maintenance for the portfolio of 110 corporate buildings, energy management and conservation, cleaning, catering, print and postal services, security and other associated hard and soft FM services.

Transactional Services - Incorporates Accounts Payable, Accounts Receivable, Mosaic administration and vendor maintenance. Ensuring prompt and accurate payment for all goods and services provided by the Council. It raises and issues invoices promptly and accurately to maximise revenue received. Furthermore, it ensures that the Vendor Maintenance database is controlled, accurate and up to date.

Safety Services- Provides Health and Safety, Emergency Planning and Business Continuity services across the Council as required by duties imposed under the Health and Safety At Work Regulations 1999, The Civil Contingencies Act 2004 and all associated regulations.

Client Financial Affairs - Act as court appointed deputies for vulnerable clients who do not have the capacity to make their own decisions or manage their own personal financial affairs. These decisions are for issues involving the person's property, financial affairs and health and welfare working in accordance with the statutory principles set out in the Mental Capacity Act code of practice to ensure that they act in the best interests of the person who lacks capacity.

Commercial Services- Are the strategic centre for procurement and category management, guidance training and advice including ownership of the Councils Procurement Strategy, involvement in key tender processes, identification of savings opportunities and commercial benefits, compliance with procurement legislation, benchmarking and best practice including ownership of the Councils contracts register.

Merton's ambitions

Support our most vulnerable residents of all ages

Maintain a clean and safe environment

Create a great place to grow up and live in

Build resilient communities

Bridge the gap and reduce inequalities

Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p><i>The Infrastructure & Technology division is responsible for providing internal support services across the Council, which in turn supports the delivery of business critical services to residents, external customers and the wider community. Each individual team collects customer satisfaction information about the quality of service being provided, some of which is then feed into strategic performance reports that are reviewed at both a departmental and corporate level. The customer satisfaction information is analysed by the divisional management team in order to identify any specific issues or longer term trends and used to drive continuous service improvement. No specific key customers identified.</i></p>	<p><i>Generally demand for services provided by the division increase year on year, but with some specific areas such as IT experiencing more significant increases in demand, due to an ever increasing reliance on IT, which is being utilised in order to reduce operating costs, improve service delivery and efficiency. The Covid-19 pandemic has seen a significant shift in the way that the Council has traditionally operated, with a massive shift towards remote working and a requirement to provide more online services. This situation has created some significant increases in demand for every team within the division who have been heavily involved in supporting the Councils wider response to the Covid situation.</i></p>	<p><i>The Covid-19 situation has created a unique situation where over a very short period of time, the Council has had to make a shift to remote and home working, virtual meetings and delivering more online services. This has resulted in a reduction in the Councils need for office accommodation and longer term potentially the number of operational premises that it operates is likely to reduce quite significantly. This will create opportunities to work collaboratively with other public sector organisations to share resources and reduce operating costs through initiatives like 'The One Public Estate'.</i></p>	<p><i>The division is heavily involved in the Council's Covid recovery planning activities and also the Modernising Merton programme, which is made up of a number of individual work streams and specific projects that are being lead and delivered by teams within I&T. In addition the division is also taking a lead role in the delivery of both central Government's initiatives aimed at reducing carbon emissions, which are complemented by the Councils pledge to reduce carbon emissions across the borough. The challenging target of making all of the Councils operational buildings carbon neutral by 2030 and the whole borough by 2050 requires a large input from the Facilities Management Energy & Sustainability team who are working to identify and deliver projects and national initiatives that will reduce our use of carbon based fossil fuels within Councils premises and schools.</i></p>

Where are we now?		
Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Implementation of IT Strategy and Plan	Partly achieved but an ongoing objective.	Carry forward
Implementation of 4P's project	Partly achieved but an ongoing objective.	Carry forward
Upgrade to O365	Upgrade completed	Close
Undertake 'Make/Buy/Share' reviews of key service provision	Partly achieved but an ongoing objective.	Carry forward
Implement SMART working programme.	Currently developing options for providing 'Re-imagined' office space within the Civic centre which will be used to pilot the new SMART working principals	Carry forward
Energy Invest to Save' initiatives	Partly achieved but an ongoing objective which will support the Council's wider carbon reduction strategy.	Carry forward

How will we get there?										
Service Objective 1					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Complete planned statutory Health & Safety workplace inspections					Statutory requirement					
					Maintain a clean and safe environment					
Performance Measures										
Indicator	2020/21 Target	2020/21 Actual	RAG	2021/21 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Complete planned statutory Health & Safety workplace inspections		0	Red	100	100	100	100	100	Quarterly	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Project / activity 1	Development and implementation of a Health & safety assessment tool enabling building managers to complete inspections which will then be subject to verification by the Safety Services team and therefore avoiding the need for numerous site visits.						Jan-22		Dec-22	
Potential barriers to achieving objective										
Description of barrier						Mitigating Actions				
Impact on the customer/end user										
Building managers will become responsible for undertaking H&S assessments of their own premises using a purpose made template and user guidance.										
Partners / interdependencies										
Service Objective 2					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Develop detailed Category Management plans					Continuously improve					
Performance Measures										
Indicator	2020/21 Target	2020/21 Actual	RAG	2021/21 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% of influencible spend published on the contract register	95%	94%	Red	96%	97%	98%	98%	98%	Quarterly	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	

<i>Project / activity 1</i>		Commercial Services Category Managers working collectively with each of the service departments to determine and agree the key strategic procurement activities across the Council and then use this to identify opportunities to consolidate spend and drive savings based on economies of scale. This is an ongoing activity that will continue over a number of financial years.							<i>Apr-22</i>	<i>Apr-23</i>
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
<i>Potential unwillingness for directorates to adequately engage with the process, due to a perceived lack of time or resources.</i>					<i>Detailed plans are being developed identifying the potential areas where strategy category plans could be of most benefit to the business, and progress is being reviewed by the Procurement Board on a quarterly basis to ensure that agreed timescales are achieved.</i>					
Impact on the customer/end user										
Partners / interdependencies										
Service Objective 3										
					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
<i>Implement agreed IT Infrastructure Roadmap</i>					<i>Continuously improve</i>					
Performance Measures										
Indicator		2020/21 Actual	RAG	2021/21 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
First time fix rate for IT Service Desk		75%	Red	75%	75%	75%	75%	75%	Monthly	High
Customer satisfaction - incident resolution rated good or excellent		98.07%	Green	91%	92%	93%	94%	95%	Monthly	High
IT Systems availability		99.87%	Green	99%	99%	99%	99%	99%	Monthly	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description							Proposed start date		Proposed end date
<i>Project / activity 1</i>	<i>Complete works identified within Year 1 (2021/22) of the IT Infrastructure Roadmap</i>							<i>Apr-21</i>		<i>Apr-22</i>
<i>Project / activity 2</i>	<i>Complete works identified within Year 2 (2022/23) of the IT Infrastructure Roadmap</i>							<i>Apr-22</i>		<i>Apr-23</i>
<i>Project / activity 3</i>	<i>Complete works identified within Year 3 (2023/24) of the IT Infrastructure Roadmap</i>							<i>Apr-23</i>		<i>Apr-24</i>
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
Impact on the customer/end user										
Partners / interdependencies										

Service Objective 4		Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions								
<i>The challenging target of making all of the Councils operational buildings carbon neutral by 2030.</i>		Maintain a clean and safe environment								
Performance Measures										
Indicator		2020/21 Actual	RAG	2021/21 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
The level of CO2 emissions from the Council's buildings	3,684	3,101	Green	3,315	2947	2579	2210	1842	Annually	High
Projects / key activities to support the objective <i>(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)</i>										
Project / activity name	Description	Proposed start date						Proposed end date		
<i>Project / activity 1</i>	<i>Completion of various energy 'Invest to Save' projects and undertake energy audit surveys for all of the Councils buildings.</i>	2022						2026		
<i>Project / activity 2</i>										
<i>Project / activity 3</i>										
Potential barriers to achieving objective										
Description of barrier					Mitigating Actions					
<i>Lack of funding to complete the necessary works required to make the Councils buildings carbon neutral by 2050.</i>										
Impact on the customer/end user										
<i>Please highlight the anticipated impact on the customer/end user of carrying out the activity in your service plan</i>										
Partners / interdependencies										

People

Staff Development - Using information collected from the annual appraisals, the I&T division has developed a detailed plan which identifies any specialist training that is required, in order to ensure that team members acquire and maintain a suitable level of specialist knowledge for both statutory and CPD requirements.

Retention/Recruitment/Vacancies - Due to the very specialist nature of some of the work undertaken within the division, staff retention and recruitment is a constant issue, with people regularly leaving to join private sector organisations, where pay rates historically are higher than in the public sector. This situation then creates a constant churn of resources in areas such as IT and Procurement, which due to their specialist nature make recruitment to fill vacancies very challenging.

SMART Working - The Covid-19 pandemic has meant that a large proportion of the staff have been working very effectively from home, with a small number of people continuing to work in the office providing physical support to the wider business and maintaining business critical systems/operations. On that basis work it is clear that the office space currently occupied by the division is not required and therefore work has started to consolidate the our operations into a smaller space which will subsequently allow the vacant space to be let commercially to one of the Councils key service providers and generate additional income.

Technology

The I&T division is responsible for working across the Council to develop an IT strategy and associated implementation plan. This includes the roll out of new technology, equipment and systems identified by each the service departments, and to undertake planned replacements in accordance with recognised industry good practice.

Service improvement

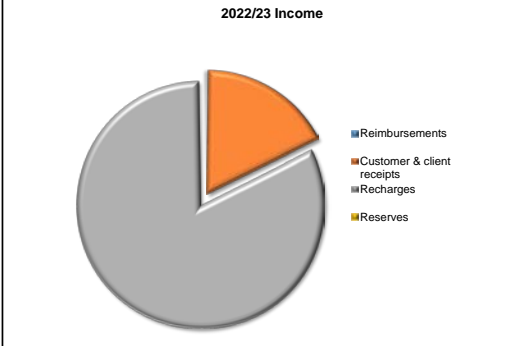
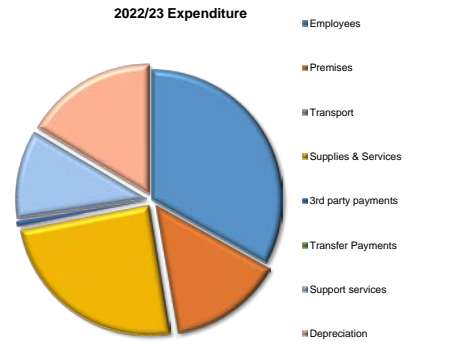
An external review of the Council's IT Service was undertaken by Agilisys in August 2020 to determine if there was a case for increasing IT capacity and capability, and whether the service was able to provide the required strategic visioning and support that was required by the council, and a detailed report was presented to CMT in May 2021. As a result of the recommendations made, a second phase of work commissioned with Agilisys to look at the prioritisation of projects which is due to be presented to CMT in December 2021. Amongst other things the report will outline some options for potential future operating models for the service.

Financial Summary

Whilst there have been favourable variances for the I&T division over recent years, the current financial position is a forecast overspend which is reflective of the impact of Covid-19. The division continues to be impacted by the recovery from Covid in terms of both external demand for services and the altered ways of working in the medium to long term, such as around the level of remote working and the potential effects on the IT services and building facilities required.

DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	16,236	15,621	17,012	(914)	17,088	16,939	17,036	17,133
Employees	5,540	5,287	5,755	(342)	5,659	5,559	5,559	5,559
Premises	2,368	2,415	2,355	23	2,414	2,303	2,338	2,372
Transport	23	18	26	(11)	27	27	28	28
Supplies & Services	3,916	3,502	4,070	(486)	4,180	4,241	4,301	4,361
3rd party payments	101	5	103	(103)	105	107	108	110
Transfer Payments	10	15	10	4	10	10	10	10
Support services	1,843	1,574	1,888		1,888	1,888	1,888	1,888
Depreciation	2,436	2,805	2,805		2,805	2,805	2,805	2,805
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	15,705	16,059	16,784	1,046	17,174	17,220	17,220	17,220
Government grants	0	0	0	0	0	0	0	0
Reimbursements	36	611	36	(74)	36	36	36	36
Customer & client receipts	2,826	1,064	3,000	1,120	3,000	3,000	3,000	3,000
Recharges	13,370	14,384	14,183	0	14,183	14,183	14,183	14,183
Reserves	(528)		(435)		(46)		0	0
Capital Funded								
Capital Funded Net Budget	532	(438)	228	131	(86)	(281)	(184)	(87)



Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Capital Building Works		626	800	0	1,329	1,375	650	650
Invest to Save		38	570	0	624	300	300	300
Business Systems		426	868	0	1,215	325	700	420
Social Care IT System		89	157	0	0	1,100	1,000	0
Disaster Recovery Site		0	333	0	0	0	0	0
Hardware Replacement Program		1,350	1,146	0	905	770	1,405	1,060
	0	2,530	3,874	0	4,073	3,870	4,055	2,430

Summary of major budget etc. changes

2022/23

Saving 2020-21 CS11 Restructure of the Commercial Services (Procurement) team and deletion of 1 permanent FTE post -£50k.

2023/24

Saving 2019-20 CS18 Closure of Gifford House and relocation of SLLP to the Civic centre -£69k
 Saving 2019-20 CS17 Closure of Chaucer centre and relocation of operational teams at the Civic centre -£77k
 Saving 2020-21 CS10 Further restructuring of the Transactional Services team -£100k

2024/25

2025/26

Service Plan for : Resources

Service Manager: *Roger Kershaw* Cabinet Member: *Councillor Tobin Byers*

Overview of the service

Accountancy - manage the financial health of the Council through advice & support to officers and Members, revenue & budget setting, profiling and reporting & monitoring. Over the next four years, we will transform by improving use of technology /reviewing processes /how information is stored in our financial systems.

Financial Strategy and Capital - manage Financial Strategy & Capital Strategy/Monitoring, Financial Systems Liaison & Development & Strategic and Operational Risk Management. The team facilitate multi-year planning, targeting resources, manage risk & integrate financial and business information. Over the next four years we will improve the robustness of our systems & projections, challenging services to improve their risk management. The Team is also responsible for the support and maintenance of e5 in accordance with legislation and best practice.

Treasury and Pensions - manage the Council's treasury (including the day to day cashflow, banking and cash), production of council's financial accounts, pension and insurance funds and oversee the contract for pensions administration.

Merton's ambitions

Support our most vulnerable residents of all ages
 Maintain a clean and safe environment
 Create a great place to grow up and live in
 Build resilient communities
 Bridge the gap and reduce inequalities
 Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p>Senior management including Councillors, CMT and DMTs.</p> <p>Budget, Project and Risk Managers.</p> <p>A survey of budget managers undertaken in Autumn 2019 found that at least 87.5% of respondents rated professional support as good/very good.</p>	<p>Demand - It is envisaged that the level of budget managers (160 individuals) and standard financial/risk reporting will remain constant over the planning period. Covid-19 continues to place considerable pressure on staff. Generally, as resources become tighter this requires additional input from financial staff to improve the accuracy of forecasting.</p>	<p>Required to meet International Accounting Standards for Local Authorities, Regulations and Best Practice. It has proved challenging for local authorities to respond to changes in requirements in the past.</p> <p>There will be changes in leasing legislation that need to be accounted for in 2022-23 account closure and also we need to account for VAT</p>	<p>The Council's continuous improvement programme - officers will be involved in supporting the continuous improvement programme and helping with the assessment of make or buy decisions.</p> <p>The long term recovery & modernising Merton programme - officers are spending considerable time ensuring that the impact of</p>

		<p>digitally by 1 April 2021.</p> <p>A considerable amount of staff time continues to be spent fully assessing the impact of Covid 19 and the additional savings required from it.</p> <p>The general uncertainty on Central Government's funding of Local Government provides significant challenges for medium term financial planning. Treatment of the Deficit on the Dedicated Schools Grant remains an issue to all local authorities.</p>	<p>Covid 19/Brexit are estimated and that the Authority remains a going concern.</p>
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Where are we now?		
Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Closing Accounts by the due date	Lessons learned review to improve next year's closing processes. Attention paid to the valuations required for closing. Experienced severe resource constraints with our external auditors EY which adversely impacted on their ability to issue their audit opinion on time.	Carry forward
Compiling a Medium Term Financial Strategy (MTFS) with a balanced budget for at least the next financial year by the March Council Meeting for approval.	Cabinet has agreed a timetable to ensure that a balanced budget and MTFS can be agreed by Council in March. The MTFS is reviewed throughout the Business Planning process and Members have been advised of progress at Cabinet meetings in September, November and December.	Carry forward
Regular monitoring of the ongoing financial position of the Council.	Forecasting accuracy of outturn and savings achievement was lower this year than previous years in part due to the initial impact of Covid-19.	Carry forward
Develop and maintain the Financial Information System.	Moved to e5.5 and Collaborative Planning 9. There were also developments on interfaces regarding payroll and moving towards making tax digital Exacom system for CIL recording, reporting and accounting implemented along with an interface to e5. Response times through e5 mailbox have reduced and considerable work was undertaken regarding the Dunning Cycle for the impact of Covid-19.	Carry forward
Develop and maintain risk registers throughout the authority ensuring that processes and practices are in accordance with best practice.	Risks were reviewed at least quarterly throughout the year with 100% of red risks mitigated with current control measures. Separate register established for Covid-19 which is reviewed every two weeks and reviewed and reported to CMT, DMT and CMRG as appropriate. Where possible items are being moved onto departmental registers	Carry forward

How will we get there?

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
Closing Accounts by the due date (publish draft accounts by 31 May, and external auditor sign off by 31 July)	Statutory requirement

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Closing Accounts by the due date (Publish draft accounts by 30 June, and External Auditor sign off by 30 September)	Due January 2022 due to auditor delays.	Red	Yes	Yes	Yes	Yes		Annually	Yes/No
Delivery against current year MTFS savings targets	59%	Red	100%	100%	100%	100%		Quarterly	High
Accuracy of P10 Revenue Forecast (compared to outturn)	73%	Red	90%	90%	90%	90%		Annually	High
Accuracy of P8 (P9 to 2013/14) Capital Forecast	73.53%	Red	90%	90%	90%	90%		Annually	High

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)			
Project / activity name	Description	Proposed start date	Proposed end date
Property Valuations	Working with Property Team regarding the delivery of Valuations Information	Sep-21	31-Mar-22
Fixed Asset System	Working with Property and Facilities Management to re-tender the computerised system	Sep-21	Mar-22
Lessons Learned	Reviewing issues arising during closing to minimise or resolve for next year	Sep-21	Dec-22

Potential barriers to achieving objective	
Description of barrier	Mitigating Actions
Material Variance on Property Valuations	Property valuations project above
Efficient Processes	Lessons Learned above
Impact on the customer/end user	
Breach of the statutory duty to close the accounts also provides key information	
Partners / interdependencies	
This activity involves Budget Managers, Senior Management, CHAS , the Housing Company and Merton and Sutton Joint Cemetery Board	

Service Objective 2	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
Compiling a Medium Term Financial Strategy (MTFS) with a balanced budget for at least the next financial year by the March Council Meeting for approval	Statutory requirement

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Compiling a MTFS with a balanced budget for at least the next financial year by the March Council Meeting for Approval	TBC			Yes	Yes	Yes	Yes	Annually	Yes/No
Delivery against current year MTFS savings targets <i>Cited under Objective 1</i>	59%	Red	100%	100%	100%	100%	100%	Quarterly	High
Accuracy of P10 Revenue Forecast (compared to outturn) <i>Cited under Objective 1</i>	73%	Red	90%	90%	90%	90%	90%	Annually	High
Accuracy of P8 (P9 to 2013/14) Capital Forecast <i>Cited under Objective 1</i>	73.53%	Red	90%	90%	90%	90%	90%	Annually	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Updating MTFS Model and providing regular reports to Senior Management, Cabinet and Council	Modelling MTFS position for current year plus 4 and options to aid decision making and updating this model appropriately - including the impact of Covid 19 and Brexit						Summer/Early Autumn	End January	
Updating the Capital Forecasting Model and production of the Capital and Treasury Management Strategies	Modelling MTFS position for current year plus 4 and options to aid decision making and updating this model appropriately - including the impact of Covid 19 and Brexit						Summer/Early Autumn	End January	
Delivery against current year Medium Term Financial Strategy Savings Targets	Monthly monitoring of delivery of savings targets and forecast delivery at year end by RAG rating - including the impact of Covid 19 and Brexit						Summer	February	
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
Impact of Covid 19/Brexit						Monitoring additional costs and impact on savings			
Incorrect forecasting						Refine forecast information monthly with debt and cashflow revised quarterly			
Impact on the customer/end user									
Provides key decision making information to meet statutory requirements to set a balanced budget, maintain a going concern and detailed budget information									
Partners / interdependencies									
Requires liaison with budget managers and senior management to incorporate all budget information for all services and the delivery of all objectives									
Service Objective 3						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions			
Regular monitoring of the ongoing financial position of the Council.						Statutory requirement			
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Delivery against current year MTFS savings targets <i>Cited under Objectives 1 & 2</i>	59%	Red	100%	100%	100%	100%		Quarterly	High

Accuracy of P10 Revenue Forecast (compared to outturn) <i>Cited under Objectives 1 & 2</i>	73%	Red	90%	90%	90%	90%	90%	Annually	High	
Accuracy of P8 (P9 to 2013/14) Capital Forecast <i>Cited under Objectives 1 & 2</i>	73.53%	Red	90%	90%	90%	90%	90%	Annually	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Cash Flow and Debt Monitoring undertaken Quarterly	Quarterly update of Cash Flow and Debt levels, debt levels to be included in the monitoring report - including the impact of Covid 19 and Brexit						Summer		February	
Delivery against current year Medium Term Financial Strategy Savings Targets	Monthly monitoring of delivery of savings targets and forecast delivery at year end by RAG rating - including the impact of Covid 19 and Brexit						Summer		February	
Continuous Improvement	Supporting the continuous improvement programme and helping with the assessment of make or buy decisions						Ongoing		Ongoing	
Potential barriers to achieving objective										
Description of barrier						Mitigating Actions				
Impact of Covid 19/Brexit						Monitoring additional costs and impact on savings				
Incorrect forecasting						Refine forecast information monthly with debt and cashflow revised quarterly				
Impact on the customer/end user										
Provides key decision making information to meet statutory requirements to maintain a going concern and detailed budget information										
Partners / interdependencies										
Requires budget managers to review their financial position and forecast to year end and the resulting information is then utilised by senior management for decision making information.										
Service Objective 4										
						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				
Develop and maintain the Financial Information System						Statutory requirement				
						Continuously improve				
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
System should be available 24 hours a day 365 days per annum	100%	Green	99%	99%	99%	99%		Monthly	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Re-tendering the Financial Management System	Current contract ceases on 6-2-21, with the two year extension will cease 6-2-23 the re-tendering process has just started						Dec-21		Feb-23	
Business Process Manager	BPM has a similar functionality to e-forms as and interfaces, module and support has been purchased						Dec-21		31-Jul-22	
Making Tax Digital	Digital determination of input and output tax due by 1-4-21						Dec-21		31-Mar-22	
Potential barriers to achieving objective										
Description of barrier						Mitigating Actions				

Impact on the customer/end user										
Anyone staff member who enters or extracts information from the system										
Partners / interdependencies										
System is used by CHAS (apart from Stripe), Housing Company and Merton and Sutton Joint Cemetery Board										
Service Objective 5					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Develop and maintain risk registers throughout the authority ensuring that processes and practices are in accordance with best practice					Continuously improve					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
% of red risks with current control measures	100%	Green	90%	90%	90%	90%		Quarterly	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Bi-annual review of risk/issue classification	Risk/Issue Classification incorrect on the risk register						Summer 22		Autumn 22	
Ensuring use and consistency in application of risk management to projects	OPG training to ensure consistency in risk management and scoring and discussion of the difference between standard and Covid risk management						TBC		TBC	
Potential barriers to achieving objective										
Description of barrier					Mitigating Actions					
Omission of a key risk or issue form the register					Processes established to review the register and report to DMTs and CMT and officers are currently considering the best way to make inter authority comparisons of Risk Registers					
All projects should have a risk register and this register fails to identify key risk/issues that undermine the success of the project.					OPG training to ensure consistency in risk management and scoring and discussion of the difference between standard and Covid risk management					
Impact on the customer/end user										
Effective risk management should minimise the impact of occurrence and maximise the effectiveness of change										
Partners / interdependencies										
Appropriate identification, classification and mitigation of risks and issues impacting on strategic and operational activity is an essential management tool										
Service Objective 6					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
96% of Insurance Claims responded to within 5 working days					Other (insert text)					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	

% of Insurance Claims responded to within 5 working days	59.75%	Red	96%	96%	96%	96%		Quarterly	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Potential barriers to achieving objective										
<i>Description of barrier</i>						<i>Mitigating Actions</i>				
<i>Resource capacity within insurance section</i>						<i>Service now shared with LB Sutton</i>				
Impact on the customer/end user										
Partners / interdependencies										

People

On the job training is provided to all new appointees, this is supplemented with internal training to ensure all staff have the appropriate professional and technical skills to undertake their jobs efficiently. In addition, key staff attend essential external training sessions for key areas such as account closure, forecasting and legislative change to ensure that processes and outputs reflect best practice and legislation.

In recent years officers have struggled to appoint suitably qualified staff from outside the organisation, this difficulty is not unique to Merton. To ease this difficulty the Resources has re-instigated it's trainee programme. The Trainee Programme currently has 3 trainees working towards a CCAB accounting qualification under the Apprenticeship scheme.

Smarter working works particularly well for Resources as long as staff have adequate access to the internet/IT equipment.

Technology

Financial Management Information System including General Ledger, Accounts Receivable, Accounts Payable and Purchasing Management (e5.5 moving to 5.6) and Collaborative Planning @CP9 (moving to CP11).Fit for Purpose]. Also require a budgeting and forecasting element (Collaborative Planning) [Fit for Purpose]

In addition require a Cash Receipting System (Currently Adelante) [Fit for Purpose], Payments and Collections System (Paygate) [Fit for Purpose] and also use Lloyds SMARTCARDS for Authentication. [Fit for Purpose]

Require an Asset Accounting System it is essential that its operation reflects the requirements of Local Authority Accounting and that the company providing the system is capable of responding to legislative change in a timely manner (System currently provided by CIPFA just entering into a tendering process) This is an off the peg solution guaranteed to be updated for legislative change in a timely manner.

Making Tax Digital is currently underway and will come under the Advanced (e5) Umbrella through December 2020/January 2021.

The current 4 year contract expires with ADV in February 2021, therefore the contract for ADV for the e5 Family of products is to be extended and is under discussion within LBM and with ADV.

This will be for the agreed plus 2 years with the potential for a 3rd year to be added. Within this proposal, LBM are proposing to introduce Spend Analysis and eSupplier, to upgrade to CP11 from CP9, and potentially review the eMarketplace product which would bring in the opportunity to punch out to Amazon, Office depot (we do this today) and open up an eshop to 450 further suppliers.

Also have a number of detailed spreadsheets for MTFs, Capital Modelling, SEN Placements and School Advances for which it would be advantageous to provide an alternative IT Solution

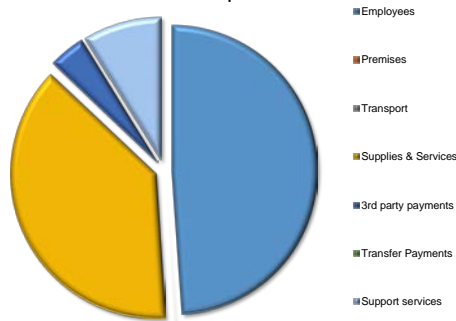
Service improvement

Financial Summary

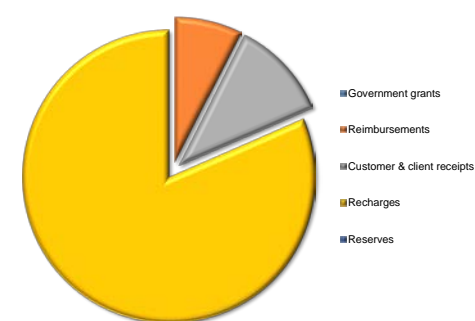
The Resources division (excluding the Revenues & Benefits service areas) financial information is shown below. Currently the budget pressures within the division are largely around the use of agency staff, proposed audit fee increases and the insurance service which has recently been outsourced to the London Borough of Sutton which is expected to improve service and financial performance.

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	6,279	7,374	6,362	288	6,485	6,454	6,491	6,528
Employees	2,981	3,413	3,056	183	3,171	3,171	3,171	3,171
Premises	2	1	2	(2)	2	2	2	2
Transport	2	3	3	1	3	3	3	3
Supplies & Services	2,463	2,867	2,393	97	2,473	2,442	2,479	2,515
3rd party payments	303	530	335	10	264	264	264	264
Transfer Payments	0	0	0	0	0	0	0	0
Support services	529	560	572	572	572	572	572	572
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	6,272	7,255	6,431	(7)	6,440	6,440	6,440	6,440
Government grants	0	0	0	0	0	0	0	0
Reimbursements	465	863	472	(66)	481	481	481	481
Customer & client receipts	710	679	710	59	710	710	710	710
Recharges	5,096	5,713	5,249	5,249	5,249	5,249	5,249	5,249
Reserves	0	0	0	0	0	0	0	0
Council Funded Net Budget	7	119	(69)	281	45	14	51	88
Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Financial Systems	0	0	0	0	0	700	0	0
Multi Function Device	0	0	0	0	0	0	600	0
Acquisitions Budget	0	0	200	0	0	0	6,785	0
Capital Bidding Fund	0	0	0	0	0	0	1,000	0
Coaching Company	0	100	0	0	0	0	0	0
Widminster Coroners Court	0	0	60	0	400	0	0	0
Corporate Capital Contingency	0	0	0	0	0	0	1,681	0
Clarion	0	0	4,079	0	0	0	0	0
Total	0	100	4,339	0	400	700	10,066	0

2022/23 Expenditure



2022/23 Income



Summary of major budget etc. changes

20

Year	Summary of major budget etc. changes
2022/23	Reverse part one-off saving 2021-22 CS12 Miscellaneous savings within Resources (eg. Consultancy) +£34k Saving 2022-23 CS1 Reduction to consultancy held within Director's budget -£10k Saving 2022-23 CS2 Reduction to Resources AD various running cost budgets, eg subscriptions -£15k Saving 2022-23 CS3 Reduce contribution to the insurance provision -£25k Reverse saving 2018-19 CS07 Retender of insurance contract +£68k
2023/24	
2024/25	
2025/26	Re-apply saving 2018-19 CS07 Retender of insurance contract -£68k

Service Plan for : Revenues and Benefits

Service Manager:	David Keppler	Cabinet Member:	Councillor Tobin Byers
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Overview of the service

Administration and collection of council tax and business rates. Administration and payment of housing benefit and council tax support. Administration of Local Welfare Support Scheme. Inhouse shared enforcement service (Bailiffs).

Merton's ambitions

Support our most vulnerable residents of all ages
 Maintain a clean and safe environment
 Create a great place to grow up and live in
 Build resilient communities
 Bridge the gap and reduce inequalities
 Continuously improve

What do we need to do?

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p><i>Customers are council tax and business rate payers benefit claimants. The shared enforcement service provides service to Merton Parking and Sutton Council. Demand in some areas will increase. The service receives the most complaints within the department and each year the complaints details are reported to CMT and General Purposes Committee.</i></p>	<p><i>Demand for some services is likely to increase i.e business support, welfare support scheme, council tax support scheme. In addition, collection of council tax and business rates is likely to be more challenging and therefore see an increase in staff time required. When the furlough scheme ends there is likely to be a large increase in work. The one service that will see a reduction of workload is the shared enforcement service.</i></p>	<p><i>The Covid-19 situation has created a unique situation where, over a very short period of time, the service has had to provide numerous additional and support schemes to residents and businesses. It is not known at this stage how many of these schemes will continue into 21/22. Early indications indicate further business rate reliefs to be implemented in 22/23</i></p>	

Where are we now?

Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Procurement and implementation of new revenues and benefits system	Soft market testing commenced in January 2020 and was then put on hold following the Covid-19 crisis. Engagement with procurement and the existing supplier recommenced in January 2021 to explore a possible way forward. Consultatnt to be engaged to undertake a review of system and options available to the service	Carry forward
Deliver Council Tax Scheme	2022/23 scheme agreed and approved. Undertake work on possible changes to scheme for 2023/24 to reduce spend	Carry forward

How will we get there?

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
<i>Deliver Performance Indicators</i>	Statutory requirement

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% of Council tax collected	96.81%	Red	97.25%	97.50%	97.50%	97.75%		Monthly	High
% Business Rates collected	90.08%	Red	97.50%	97%	97.25%	97.50%		Monthly	High
Number of processing days for new Housing Benefit claims	9.86 days	Green	14 days	14 days	14 days	14 days		Monthly	Low
Number of processing days for Housing Benefit change of circumstances	7.77 days	Green	8 days	8 days	8 days	8 days		Monthly	Low
Accuracy of benefit payments over £1500	95.72%	Green	95%	95%	95%	95%		Quarterly	High

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
<i>Project / activity 1</i>	Business as normal	Apr-22	Mar-23

Potential barriers to achieving objective

Description of barrier	Mitigating Actions
<i>Impact of Covid-19 on residents and businesses to pay</i>	<i>Additional resource to target collection - however recruiting is a challenge</i>
<i>Increase in demand</i>	<i>Initiative to retain apprentices beyond original contracts</i>

Impact on the customer/end user

Impact on residents and businesses in the borough - supporting the most vulnerable - raising income for the Council

Partners / interdependencies

Collect council tax and business rates for GLA and Government - administer housing benefits for Department of Work and Pensions

Service Objective 2	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
<i>Deliver Government support and grant schemes</i>	Build resilient communities

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2020/21 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity

n/a											
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)											
Project / activity name	Description						Proposed start date		Proposed end date		
Deliver Business Support Schemes	Deliver business rates reliefs in 22/23						Feb-22		Mar-23		
	Deleiver any new government initiatives						Apr-22		Mar-23		
	Deliver Test and Trace grants						Apr-22		Not known		
Potential barriers to achieving objective											
<i>Description of barrier</i>						<i>Mitigating Actions</i>					
Demand higher than funds available						Communications					
Time pressures on delivering support						Communications and clear plan to manage expectations					
Impact on the customer/end user											
Support for businesses - both short to medium and longer term impacts on Merton businesses											
Partners / interdependencies											
Support schemes are Government initiatives - but some schemes are discretionary so the Council can determine priorities											
Service Objective 3											
						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Review Council Tax Support Scheme						Support our most vulnerable residents of all ages					
Performance Measures											
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity		
n/a											
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)											
Project / activity name	Description						Proposed start date		Proposed end date		
Deliver CTS scheme as required	Understand what type of scheme members want to introduce and identify possible savings						Apr-21		Nov-22		
Project / activity 2	Provide examples of alternative schemes						Apr-21		Mar-22		
Potential barriers to achieving objective											
<i>Description of barrier</i>						<i>Mitigating Actions</i>					
Reduced funding to maintain existing scheme											
Impact on the customer/end user											
A revised scheme that does not support residents to current level will result in possible hardship for residents and impact on council tax collection rate											
Partners / interdependencies											
GLA - as they contribute to part of the cost of the scheme											

People

The service has utilised working from home for 20 years. We have permanent homeworkers and up until the recent crisis staff were able to work from home up to 4 days a week. Working from home is business as usual. The age profile of the staff is high and so succession planning is needed in the near future. However, the service has made good use of apprentices and where possible has retained them into permanent or fixed term contract positions. Recruitment is a challenge, trying to recruit experienced staff has been difficult.

Technology

As mentioned above there may be the need to invest in laptops to provide for all the staff working at home. The Revenues and Benefits system is on a rolling one year contract and this needs to be addressed in the next year. The Council will look for a hosted solution. The system supplier has enabled the service to react quickly to all the different government support schemes for businesses and residents implemented this year. A consultant will be engaged to undertake an independent review of the system and options available to the council.

Service improvement

A Make or Buy review has been completed on the Revenues and Benefits service.

A review of the Enforcement service/shared service has been undertaken. The impact of Covid-19 has resulted in reduced workloads and as a result a restructuring reducing staffing levels was completed. The DWP continue to place more work on to benefit services.

Financial Summary

The Revenues and Benefits service has been greatly affected over recent years by the pandemic, and its impact on enforcement and court cost income. The bailiff team has recently been reduced in size which limits the financial losses but it remains unclear if the level of income for the service will be able to recover in future to achieve pre-covid-19 levels. Court cost income has recovered well during 2021/22 following the reintroduction of regular court dates.

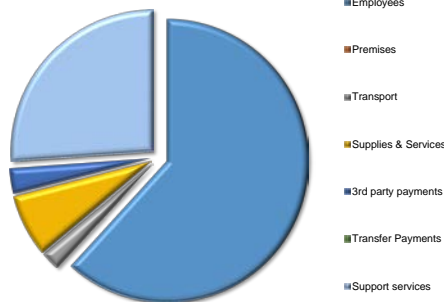
DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	5,818	6,569	6,073	313	6,358	6,369	6,380	6,391
Employees	3,604	4,244	3,664	459	3,928	3,928	3,928	3,928
Premises	0	0	0	0	0	0	0	0
Transport	125	122	129	(24)	135	137	139	141
Supplies & Services	429	440	441	56	452	458	465	471
3rd party payments	175	1	178	(178)	182	185	188	190
Transfer Payments	0	0	0	0	0	0	0	0
Support services	1,483	1,762	1,661	0	1,661	1,661	1,661	1,661

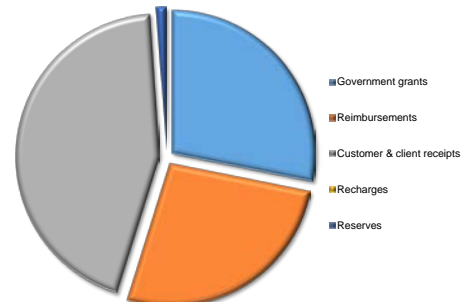
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	3,351	2,565	3,325	(189)	3,609	3,609	3,609	3,609
Government grants	1,050	1,403	1,039	(268)	1,039	1,039	1,039	1,039
Reimbursements	970	657	970	(100)	984	984	984	984
Customer & client receipts	1,361	505	1,356	179	1,626	1,626	1,626	1,626
Recharges	0	0	0	0	0	0	0	0
Reserves	(30)	0	(40)	0	(40)	(40)	(40)	(40)
Council Funded Net Budget	2,467	4,004	2,748	124	2,749	2,760	2,771	2,782

Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
		0	0	0	0	0	0	0
		0	0	0	0	0	0	0
		0	0	0	0	0	0	0
		0	0	0	0	0	0	0
		0	0	0	0	0	0	0
		0	0	0	0	0	0	0
		0	0	0	0	0	0	0
		0	0	0	0	0	0	0
		0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0

2022/23 Expenditure



2022/23 Income



Summary of major budget etc. changes

2022/23

Saving 2018-19 CS08 Increase in income from Enforcement Service -£20k

2023/24

2024/25

2025/26

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Environment & Regeneration

Service Plan for : Development & Building Control

Service Manager:	Lesley Barakchizadeh	Cabinet Member:	Councillor Martin Whelton
Peer review date:		Name of peer:	
Date created:	16/11/2020	Date of next review:	

Overview of the service

Provide a brief overview of your service and the outcomes it seeks to provide for residents/service users, including any statutory duties that impacts on this

Planning and Building Control legislation is a major component of national , regional and local policy driving actions to support the Climate Emergency. Future sustainable regeneration of the borough is a key component of the Council's strategy to create a clean and safe environment, build more homes and to create more resilient communities. Another priority across the team is to ensure income generation opportunities are maximised wherever possible. The main priority from the last TOM revolved around mobile and electronic working. This has progressed slower than was hoped but the main starting component, the M3 database upgrade, is imminent.

Planning Applications which were expected to reduce across the board during the pandemic, have increased within the team and nationally, putting an increased pressure on the team to improve and maintain performance. Income generated has increased and savings can be generated by moving away from the current heavy reliance on agency staff to filling vacancies on a permanent basis. Reviewing salaries to ensure they are competitive as current roles and job titles are out of date in comparison to other London Boroughs. A light restructuring of the team is underway with new Principal Planning Officer posts being created to assist with retention and recruitment of staff.

Building Control provides an increasingly important and high profile service, following proposed changes to legislation after Grenfell. A recent dangerous buildings incident demonstrated the importance of the need for the service to be fully equipped to take action against developers who are not acting in compliance with building regulations. In this instance, through team working with highways, legal and others, building control was able to successfully and speedily resolve a situation which led to a dangerous situation for the public and road and pavement closures. However, it has highlighted the continuing and increasing importance of the service. Now that the Building Safety Bill has been published, and recommendations have been received from the LABC, a review of the service will be undertaken. The other impact of this will be to ensure that market share which has been steadily declining will be strengthened and increased, resulting not only in increased income generation but in a reduction of the complaints and problems that arise through the use of Approved Inspectors.

The Enforcement Team has increased its backlog of cases and an Action Plan has been started which will focus upon staffing, the recording and use of statistics to inform and improve the service as well as concentrating on reducing the current backlog. An interim Enforcement Team Leader post has been brought in to assist and temporary funding has been allocated for an additional enforcement officer. Improvements to both our webpage and M3 are required to enable both this and the easy reporting of complaints by the public. We will have to work closely with IT to achieve this. Another important aspect of the enforcement team is trees and conservation both of which sit under this umbrella. There is an increased focus on both activities in an area where the posts are hard to fill. These will be addressed and we have brought in an agency tree officer to concentrate on reducing the backlog.

Merton's ambitions

It is important that the activity in your service plan has a clear link to helping achieve the council's overall ambitions. Please consider these ambitions when developing your plan and ensure that activity and projects are matched against them:

- Support our most vulnerable residents of all ages
- Maintain a clean and safe environment
- Create a great place to grow up and live in

Build resilient communities
 Bridge the gap and reduce inequalities
 Continuously improve

What do we need to do?

In developing your plan it is important to understand the wider context in which the service and the council operates. Please refer to Merton Data as a tool to help you understand the present and future demands on your service and the views and needs of its customers. This should be combined with local intelligence held by your service.

[Merton Data](#)

[The Merton Story](#)

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p><i>Our customers comprise residents, councillors, other council service areas and businesses both inside and outside the borough. Applications and accordingly, the number of customers is continuing to rise given the increase in population growth and new housing delivery targets as well as people focussing on home improvements during the pandemic. There is still significant and steadily increasing competition in building control from approved inspectors. The only way to claw back market share will be to ensure the Building Control team has adequate resources to deal with inspections and to improve the level of service provided to customers. New legislation following Grenfell has increased the need to ensure we have a fully staffed up and well trained team to deal with the increased demands that will be placed upon the service.</i></p>	<p><i>Planning applications have increased across the board as has the need for Planning Performance Agreements. We have difficulty extracting the required statistics from the M3 system and we need to ensure that we are measuring the correct measures and publishing these. With regard to Building Control market share, this has gradually been declining and the team now has just over one third of the market. Not only does this lead to a reduction in income but it also leads to an increase in complaints about work over which we have no control as it is being signed off by Approved Inspectors.</i></p>	<p><i>Changes have taken place to the National Planning Policy Framework putting a greater emphasis on trees and beautiful spaces. We have not seen the expected changes to the planning system reducing community involvement but there could be further changes. Due to changes that came in last August regarding permitted development rights and prior approvals, we have found that we have less control over certain developments such as building on top of existing properties and change of use. Prior Approvals have led to decreased charges for the same amount of work resulting in a net loss of income for certain approvals. With regard to Building Control, proposed legislative changes as a result of Grenfell mean that there is increasing need to have a fully trained up and resourced building control team to cope with the increased focus on fire and building safety. It is more important than ever to ensure that staff are professionally qualified and continuously update their professional knowledge and competence through CPD.</i></p>	<p><i>The B @ DC teams will continue to operate and provide a quality professional service and to contribute to the council's continuous improvement programme of working to be London's best. The imminent IT upgrades of M3 will ensure support of the long term recovery & modernising Merton programme. The reaction to and transformation as a result of the new legislative changes, will be key moving forward.</i></p>

Where are we now?		
Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Maintain or exceed Key Performance Indicators	We need to ensure that timely and up to date information is added to M3 and other systems put in place to ensure we can accurately monitor our performance.	Carry forward
Upgrade to 'Assure' following successful Re-procurement of Northgate M3.	Imminent: see above.	Carry forward
Roll out various service eforms. Priority the Enforcement web form.	BC form still being worked on. DC : likely need eliminated due to Portal/M3 upgrade. The Enforcement web form is being looked at as part of an Enforcement Action Plan	Close
Succession planning for BC team including team manager and commercial manager.	This has not been actioned due to proposed changes in the BC legislation and the finalisation of an LABC service report to inform. A review of the team structure is planned for early in the year.	Carry forward
Draw up an Enforcement Action Plan to improve planning enforcement performance and reduce the current backlog	An Action Plan is currently underway and an Interim Team Leader is shortly due to start.	Carry forward
Reorganise and rename the DC teams to bring the service up-to-date, ensuring pay is in line with other London Boroughs, and improve staff retention and ability to recruit.	We are currently part way through a light reorganisation of the DC team, updating job descriptions and roles and the creation of Principal Planner roles to provide career progression within the team. Roles being job evaluated to ensure pay is competitive against other London Boroughs and to improve staff retention. Minimise the use of agency staff and fill posts as they become vacant, reducing the overspend and ensuring adequate experienced staff to deal with the increasing workload.	Carry forward
Strengthen the Planning Tree and Conservation service areas as these are increasingly important especially given changes to the NPPF and climate change	An Interim p/t tree officer has been appointed and a second person is being recruited. This will assist in reducing the backlog and will ensure that trees and listed buildings are given the protection they need.	Carry forward
Overhaul the Planning Admin Team to ensure they enable the wider team by providing front-line services, and the maintenance of meaningful statistics	Interim Team Leader starting shortly and permanent to be recruited. Provision of data being reviewed and services such as land charges to be incorporated. Use of M3 and other IT systems to be reviewed to be made more efficient.	Carry forward

How will we get there?

Try to limit this to no more than around 5-7 key objectives. This section should be reviewed if there are any significant changes in direction during the year. Changes can be noted along with the reasons for and implications of the change. When you review this, look for opportunities, insights, or risks that have emerged.

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
<i>Maintain or exceed key performance indicators.</i>	Build resilient communities
	Create a great place to grow up and live in
	Statutory requirement

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% Major planning applications processed within 13 weeks	88.00%	Green	80%	81%	82%	83%		Monthly	High
% minor applications determined within 8 weeks	75.62%	Green	72%	73%	74%	75%		Monthly	High
% "other" applications determined within 8 weeks	80.20%	Red	83%	84%	84%	84%		Monthly	High
% of appeals lost	16.25%	Green	35%	35%	35%	35%		Quarterly	Low
Income (Development & Building Control)	£1,610,038	Red	£1,966,000	£ 1,966,000	£ 1,966,000	£ 1,966,000		Monthly	High
% of Market share retained by local authority (building control)	61%	Green	54%	55%	55%	55%		Monthly	High
No. of planning enforcement cases closed	227	Red	530	540	550	550		Monthly	High
No. of backlog planning enforcement cases	652	Red	500	300	480	470		Monthly	Low

Projects / key activities to support the objective <i>(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)</i>			
Project / activity name	Description	Proposed start date	Proposed end date
<i>Upgrade reporting as part of 'Assure'</i>	Ensure targets are embedded into Assure day to day reporting systems	<i>Apr-21</i>	<i>Apr-22</i>
<i>supporting regeneration and growth</i>	Facilitate sustainable regeneration by improved performance overall	<i>Apr-21</i>	<i>Apr-22</i>

Potential barriers to achieving objective	
Description of barrier	Mitigating Actions
<i>M3 systems support failings</i>	<i>Arrange IT support</i>
Impact on the customer/end user	
<i>Maintaining service quality and performance</i>	
Partners / interdependencies	
<i>Future Merton are a close partner in delivering regeneration in the Borough and supply detailed professional advice on planning applications.</i>	

Service Objective 2				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
<i>Finalise the upgrade of M3 Assure and roll out mobile working where appropriate.</i>				Statutory requirement					
				Build resilient communities					
				Continuously improve					
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Success will be measured by the upgrade when it occurs									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	
<i>Upgrade to cloud version</i>	Complete								
<i>Upgrade all templates</i>	In progress					<i>Ongoing</i>		<i>Apr-22</i>	
<i>Upgrade to Assure</i>	Migrate to Assure					<i>Ongoing</i>		<i>Jul-22</i>	
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
<i>Training</i>					<i>Being planned as part of project</i>				
<i>Resources</i>					<i>For training</i>				
<i>new process review</i>					<i>Business improvement team involved in looking at processes</i>				
Impact on the customer/end user									
Partners / interdependencies									
<i>Future Merton also accesses the system and provide professional advice.</i>									
Service Objective 3				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
<i>Succession planning for BC team including team manager and commercial manager.</i>				Create a great place to grow up and live in					
				Build resilient communities					
				Statutory requirement					
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
New roles in place within team									
Increased Market Share									
Achievement of improved customer service									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	
<i>Review Roles within team</i>	Carry out a full restructure of roles and responsibilities					<i>Apr-22</i>		<i>Aug-22</i>	
<i>Produce a Marketing Plan</i>	Produce a SWOT analysis and marketing plan targeting customers who would otherwise take their business to Approved Inspectors					<i>Aug-22</i>		<i>Dec-22</i>	
<i>Increased/improved 'customer care'</i>	Focus on improved					<i>Apr-22</i>		<i>Aug-22</i>	
Potential barriers to achieving objective									

Description of barrier					Mitigating Actions				
Resources including time and ability to undertake a comprehensive service review of Building Control taking into account new legislation					Will use experienced consultancy/interim				
Job descriptions will require reviewing and changing					Will need to work closely with HR				
Resistance to change					Benefits for team will become apparent				
Impact on the customer/end user									
Increased Market Share will provide considerable benefits for customers as currently we receive a large number of complaints that we cannot deal with as the sites are being handled by Approved Inspectors and we have no control over these.									
Partners / interdependencies									
LABC are able to offer support and guidance and have already made recommendations for changes to the service area									
Service Objective 4					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				
Draw up an Enforcement Action Plan to improve planning enforcement performance and reduce the current backlog					Statutory requirement				
					Continuously improve				
					Maintain a clean and safe environment				
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date		Proposed end date
Produce an Action Plan	An Action Plan is currently underway and an Interim Team Leader is shortly due to start.						Dec-21		Apr-22
Potential barriers to achieving objective									
Description of barrier					Mitigating Actions				
Lack of resources and funding for Enforcement Team					Put back funding for Team Leader Post				
Impact on the customer/end user									
Increasing backlog of enforcement cases and time taken to investigate will be reduced									
Partners / interdependencies									
Development Management is heavily reliant on having an effective enforcement function otherwise it is planning without 'teeth'									
Service Objective 5					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				
Reorganise and rename the DC teams to bring the service up-to-date, ensuring pay is in line with other London Boroughs, and improve staff retention and ability to recruit.					Statutory requirement				
					Continuously improve				
					Maintain a clean and safe environment				
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									

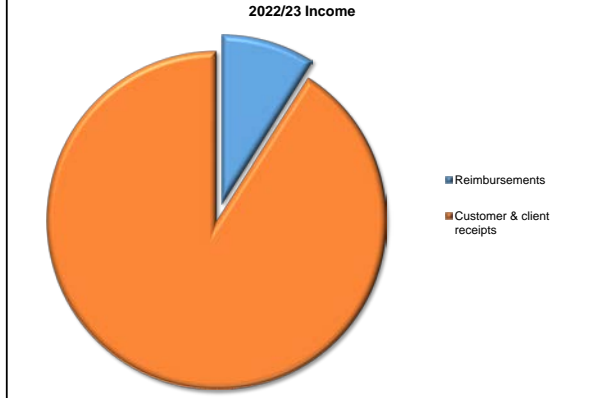
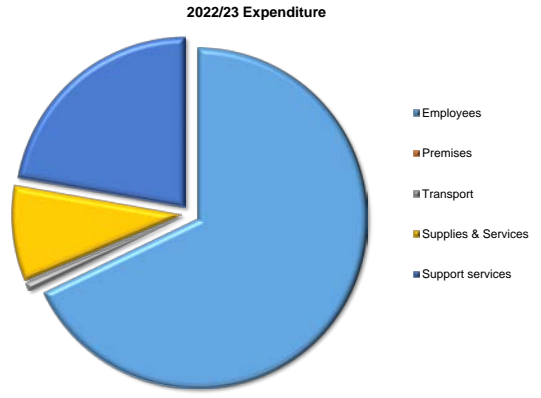
Project / activity name	Description	Proposed start date	Proposed end date						
<i>Restructure the Team</i>	Update JDs; Name of function; Create Principal Posts; Job Evaluate to ensure that there is adequate career progression within the team to undertake the increasing large and complex workload and to retain and recruit experienced staff	<i>Dec-21</i>	<i>Apr-22</i>						
Potential barriers to achieving objective									
<i>Description of barrier</i>		<i>Mitigating Actions</i>							
<i>Staff resistance to change and limited resources.</i>		<i>Explain reason for changes and work with HR to gain results</i>							
<i>Heavy reliance upon agency staff leading to inefficiencies and overspend</i>		<i>Recruit permanent staff asap where budget permits</i>							
Impact on the customer/end user									
<i>Improved ability to process applications in a timely and manner. Will also lead to increased income generation and a quality service.</i>									
Partners / interdependencies									
<i>The Development Management Team has a major impact upon regeneration and needs to work closely with Futures Merton</i>									
Service Objective 6		Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions							
<i>Strengthen the Planning Tree and Conservation service areas as these are increasingly important especially given changes to the NPPF and climate change</i>		Create a great place to grow up and live in							
		Build resilient communities							
		Continuously improve							
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Reduction in trees with TPOs felled									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description	Proposed start date	Proposed end date						
<i>Strengthen the Planning Tree and Conservation service areas</i>	An Interim p/t tree officer has been appointed and a second person is being interviewed. This will assist in reducing the backlog and will ensure that trees and listed buildings are given the protection they need.	<i>Dec-21</i>	<i>Apr-22</i>						
Potential barriers to achieving objective									
<i>Description of barrier</i>		<i>Mitigating Actions</i>							
<i>Lack of resources and funding for Enforcement Team</i>		<i>Need to put in place funding for tree officer and increased conservation post</i>							
Impact on the customer/end user									
<i>Trees play an important role in mitigating against Climate Change. They also contribute to making places 'beautiful' as per the National Planning Policy Framework</i>									
Partners / interdependencies									
<i>Greenspaces</i>									

People
<p>1) Currently the team has slipped back to nearly 30% temps overall having fought very hard to get it down to 10% in 2019. Permanent recruitment is now once again underway and this will ensure the team is more cost effective. In Development Control, new roles (to replace some of the existing roles) have been created and are currently with job evaluation. This will aid career progression, increase retention of staff and bring Merton in line with other London Boroughs.</p> <p>2) Succession planning in BC is already recognised as an objective of this plan. There are difficulties in starting apprenticeship as post grad education is not allowed in that scenario, whereas most surveyors are qualified to degree level already. The Hackett report and legislation will effectively dictate improvement required as will the LABC report.</p> <p>3) Training in both BC and DC is required for professional reasons. The new BC legislation is almost certainly going to require improved accredited standards. This is already underway but level 6 attainment to deal with high buildings has not yet been achieved.</p> <p>4) Smarter working: mobile working and devices for Enforcement and BC as required. Remote working for all staff with reduced office space requirements even after Covid-19. Appropriate home working facilities to be better established.</p> <p>5) Staff will predominantly work at home and only come into the office if required for collaborative days when required. It is anticipated that this will be for 1 or 2 days per week in any event once Covid is eradicated. Officers will travel from home to site visits and directly back to home without the need to visit the offices. This has been successfully implemented so far.</p> <p>6) The admin team are still having to visit the office to continue paper printing and the letter printing project will continue to try to make all correspondence electronic with all letters going direct to the post room. Significant improvements to IT systems are required.</p>
Technology
<p>1) Upgrade of M3 to 'assure' imminent in any event. Mobile devices will be required for required for BC and Enforcement . It is anticipated that this will be in the form of a tablet, however, a tablet for site and laptop for home may be required as a combined unit may be prohibitively expensive (will seek advice from Northgate and IT about what equipment suits the system).</p> <p>2) All team members will require an up to date laptop and either one or 2 large screens at home.</p> <p>3) Upgrade of all M3 templates currently being undertaken.</p> <p>4) Full home working environment to be assessed.</p> <p>5) GIS system to be utilised to provide all information to the public to ensure avoidable contact is reduced.</p>
Service improvement
<p>1) Various aspect of the administration and registration process undertaken by the admin team and planners: Uploading docs to M3. pre-app storage , document naming. Restructuring of a number of the teams is taking place to ensure that we are fully staffed up to cope with the increasing demands within this busy area.</p>

Financial Summary - Development & Building Control

In spite of the pandemic, the department has seen a growth in planning applications and is currently forecasting an over-recovery in income.

DEPARTMENTAL BUDGET AND RESOURCES								
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	2,732	2,675	2,732	(39)	2,909	2,914	2,918	2,922
Employees	1811	1647	1811	18	1892.26	1,892.95	1,893.56	1,894.25
Premises	2	3	2	3	0	-	-	-
Transport	27	12	27	(12)	21.98	22.31	22.6	22.93
Supplies & Services	248	330	248	(48)	253.86	257.58	260.88	264.6
3rd party payments	0	0	0	0	0	-	-	-
Transfer payments	0	1	0	0	122.03	122.03	122.03	122.03
Support services	644	682	644	0	618.66	618.66	618.66	618.66
Depreciation								
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	2,046	1,625	1,992	332	2,190	2,190	2,190	2,190
Government grants	0	0	0	0	0	0	0	0
Reimbursements	134	0	0	0	197.95	197.95	197.95	197.95
Customer & client receipts	1912	1,625	1992	332	1992.44	1,992.44	1,992.44	1,992.44
Recharges								
Revenues								
Capital Funded								
Capital Funded Net Budget	686	1,050	740	293	718	723	727	732



Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
		0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0

Summary of major budget etc. changes

2022/23

ENV2021-10 = (£15k) - Reduce BC/DC admin by 1 FTE.

2023/24

No significant changes.

2024/25

No significant changes.

2025/26

Service Plan for : Future Merton

Service Manager: *Paul McGarry* Cabinet Member: *Cllr Whelton, Cllr Lanning, Cllr Pritchard, Cllr Cooper-Marbiah*

Overview of the service

Provide a brief overview of your service and the outcomes it seeks to provide for residents/service users, including any statutory duties that impacts on this

Future Merton is the Council's lead on growth and strategic development. Not only for the long-term sustainability of the borough but to lead on Recovery and Regeneration in response to YourMerton. Our primary objective is to contribute to Merton the place and enhance the quality of life for our residents. The service leads on the Local Plan and monitors the delivery of new housing in Merton and supports the creation of new businesses and jobs. We manage the Council's highways and street lighting contracts to ensure that the borough's network of roads, footways, cycle lanes and street lighting are well maintained and safe. Future Merton also lead on town centre and estate regeneration projects as well as leading on the Climate Emergency and high streets recovery. We are also responsible for delivering locally, the objectives of the Mayor of London's Transport Strategy and London Plan. Future Merton contributes to the Merton Partnership via the activities of the Sustainable Communities Transport Partnership (SCTP) Economic Wellbeing Group, Employment & Skills sub-group, Housing Group and Climate Emergency Steering Group. The team also services the Borough Plan Advisory Committee (BPAC), the Design Review Panel (DRP) and leads on South London Partnership's Transport, Growth and Skills boards. Key service areas include; Regeneration, Place making, Strategic Planning, Housing Delivery Strategy, Economic Development, Climate Emergency + Action Plan, Traffic & Highways, Road Safety, Flood Mitigation, Urban Design, management of the Community Infrastructure Levy, delivery of CIL projects and management of Vestry Hall voluntary sector hub.

Merton's ambitions

It is important that the activity in your service plan has a clear link to helping achieve the council's overall ambitions. Please consider these ambitions when developing your plan and ensure that activity and projects are matched against them:

Support our most vulnerable residents of all ages
 Maintain a clean and safe environment
 Create a great place to grow up and live in
 Build resilient communities
 Bridge the gap and reduce inequalities
 YourMerton: High Streets, Public Realm, Traffic and Active Travel ambitions

What do we need to do?

In developing your plan it is important to understand the wider context in which the service and the council operates. Please refer to Merton Data as a tool to help you understand the present and future demands on your service and the views and needs of its customers. This should be combined with local intelligence held by your service.

[Merton Data](#)

[The Merton Story](#)

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
Our customer base is wide ranging, from residents and councillors to external customers such as developers, utility companies and partners including GLA, TFL, SLP and Merton	Demand for our service will increase in a number of areas as part of YourMerton and in response to reshaping the borough post-pandemic. The borough's housing target has	Significant national changes to planning legislation place greater emphasis on housing delivery and more pressure on 'up-front' plan making, masterplans or briefs for individual	The Future Merton team will continue to provide a quality, wide ranging service with a focus on place making to drive forward the growth agenda. Continual improvements

<p>Partnership. Future Merton regularly engages residents through the creation of the Local Plan (surveys and face-to-face engagement) as well as day-to day consultations on Traffic, Road Safety and Highway projects. The team also inputs heavily to the Planning Applications process providing specialist policy input to Development Control in areas such as design, flooding, transport, housing, climate change, highways, ecology and economy. The service area attracts a high volume (and increasing number) of Member Enquiries and direct enquiries from residents and local groups. Future Merton responds to 900+ Member Enquiries and FOIs and this has been steadily increasing over +100% in the past 3 years; correlating to the increase in residents and councillors engaging with and reacting to issues on social media (Twitter/Next-door) The increase in enquiries and other customer contact relates heavily to perceptions of development and resistance to change (for planning and changes to the road network such as LTNs/Cycling/School Streets).</p>	<p>increased by over 200%. The Council needs to double its housing delivery output which will require more input to the Planning Service and greater impacts on Design, Traffic, Sustainable Travel and developer engagement. There will also be a resulting increase in enquiries and complaints around Planning proposals. Merton Also declared a climate emergency that will place additional pressure on the service to deliver cross-departmental actions. The increase in development and population will lead to an increase in CIL and the number of CIL funded projects to be delivered to mitigate the impacts of development.</p>	<p>sites to guide quality, where permission is likely to be pre-approved in principle. These changes will place greater pressure and scrutiny on specialised skills that will still input to the process such as design, sustainability and transport. Economic recovery from Covid-19 will be at the forefront of the Council's agenda and will require increased resources for the economic development service and greater partnership working. Challenges with the relationship between Government and GLA, in particular TFL are placing unprecedented pressure and financial constraints on the service and our ability to deliver on resident's expectations.</p>	<p>already embedded in the team include the Mayrise system, enabling Highway inspection and permitting to be conducted on-site / mobile working. The team has also digitised how it engages residents on the Local Plan with greater use of online tools which attract greater levels of feedback from a more representative demographic spread. Increased digitisation of the Planning System will continue and new systems such as Merton's GIS as well as online tools like Commonplace and VuCity will enable Merton produce better outcomes for customers. Highways will soon launch the FixMyStreet platform to enable residents to report road faults more easily and to help the service minimise multiple reports for the same issues. The Key measure of success is what residents see on the ground, from new housing development, public realm improvements, continued roll out of cycle infrastructure and CIL funded project delivery such as shopfront improvements and investment in our high streets. The service also leads on Housing Delivery and works between Planning and Property to maximise housing outputs for the borough.</p>
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Where are we now?

Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
GIS system - To be customer facing as well as internal. Build in use of GIS for web-based consultation and 3D capability to support the GLA digitising planning agenda	New Merton Maps GIS system is active but not yet public facing and 3D functions to be developed and launched.	Carry forward
Office Environment - layout of 9th Floor is not conducive to collaborative working with design teams. More breakout and flexible space needed.	Somewhat taken over by events in home / flexible working. This project is largely out of scope, but FutureMerton will feed into any new plans for Civic Centre reorganisation.	Carry forward
Roll out of Mobile Working for Streetworks and Highway Inspections.	Complete.	Close
Reorganisation of Streetworks Permitting team to merge permitting/inspection roles and revise work/inspection area patches from 3-4.	Complete.	Close
Review of organisation and ToR of Design Review Panel.	Scoped out but delayed due to Covid. Digitisation of DRP complete thanks to Zoom. Review underway to conclude March 2022.	Carry forward
Review of Project Programming processes for Traffic and Highways teams and integration with FMC contract. Review also includes public engagement process on Traffic Schemes.	Review concluded but largely taken over by events relating to TFL funding pressures and other team priorities	Close

How will we get there?

Try to limit this to no more than around 5-7 key objectives. This section should be reviewed if there are any significant changes in direction during the year. Changes can be noted along with the reasons for and implications of the change. When you review this, look for opportunities, insights, or risks that have emerged.

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
Climate Emergency and Climate Action Plan	Create a great place to grow up and live in
	Build resilient communities
	Maintain a clean and safe environment

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Adopt Climate Change Action Plan	Adopted	Green	-	-	-	-		Annually	High
Number of publicly available Electric Vehicles Charging Points (cumulative)	140	Green	200	250	300	350		Annually	High
Increase Active Travel (TFL LIP)	-	Not Yet Known	-	-	-	-		Annually	Low
Reduce LBM Operational emissions to Zero by 2030	-	Not Yet Known	-	-	-	-		Annually	High
Reduce Borough emissions to zero by 2050	-	Not Yet Known	-	-	-	-		Annually	High

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)			
Project / activity name	Description	Proposed start date	Proposed end date
Climate Action Plan	https://www.merton.gov.uk/assets/Documents/Draft%20Climate%20Strategy%20and%20Action%20Plan%20-%20Council%20V2.pdf	Apr-21	Apr-30
Air Quality Action Plan	https://www.merton.gov.uk/communities-and-neighbourhoods/pollution/air-quality-and-air-pollution/local-air-quality-management	Apr-20	Apr-23

Potential barriers to achieving objective	
Description of barrier	Mitigating Actions
Resources and macro-economic issues to achieving carbon neutrality	See climate Change Action Plan
Impact on the customer/end user	
Greener more sustainable environment and economy for Merton residents	
Resident involvement in shaping / delivering actions	
Partners / interdependencies	
Cross Council and working with Mayor of London, TFL and Government	

Service Objective 2	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
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Estate Regeneration programme (in partnership with Clarion Housing)				Bridge the gap and reduce inequalities						
				Create a great place to grow up and live in						
				Build resilient communities						
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
No LBM indicators - Clarion Housing Group (CHG) responsibility		Green						Annually	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Reserved Matters Planning Apps	Progress phased planning applications as per planning performance agreements						01-Apr-18		01-Apr-24	
CPO authority	Progress reports seeking use of CPO powers as per CHG project programmes						01-Apr-21		01-Apr-24	
Potential barriers to achieving objective										
Description of barrier				Mitigating Actions						
CHG business plan				s plan, financial status and programme concluded and reported to Cabinet Nov 2021 setting out fu						
Impact on the customer/end user										
Working with CHG to improve housing conditions for existing residents and increase the supply of new housing in Merton.										
Partners / interdependencies										
Clarion Housing Group, LBM Housing Needs, Development Control (Planning.										
Service Objective 3				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
Merton's New Local Plan 2021/22				Statutory requirement						
				Create a great place to grow up and live in						
				Bridge the gap and reduce inequalities						
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
Adopt Local Plan 2021	Consultation launched	Green	Adopt Local Plan	Annual Monitoring Report	Annual Monitoring Report	Annual Monitoring Report	Annual Monitoring Report	Annually	Low	
New homes built annually	375	Red	918	918	918	918	918	Annually	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Consultation on Stage 3	Public consultation on draft Local Plan						13-Nov-20		01-Feb-21	
Submission of Plan to Inspector	Plan submission to Secretary of State / Planning Inspector.						Jul-21		Dec-21	
Public Enquiry	Plan examination in Public (dates set by Inspector TBC)						Mar-22		Dec-22	
Potential barriers to achieving objective										
Description of barrier				Mitigating Actions						
National changes to planning policies requiring further re-draft of the Plan				Representations to Gov on changes, watching brief						
Further delays to the London Plan adoption and housing target changes.				Watching brief						

<i>Further Changes to National Planning Policy, Permitted Developments</i>										
<i>Housing Target: barrier includes land availability and planning risk (higher density schemes)</i>					<i>Local Plan policies, guidance and site allocations mitigate some risk, ultimately PAC decisions.</i>					
Impact on the customer/end user										
<i>New Local Plan provides greater clarity on growth objectives, housing delivery and decision making on planning apps. (customer = developers / applicants).</i>										
<i>Increasing housing supply offers more housing choice for residents. Supporting businesses through CIL investment benefits the local environment and amenity for residents.</i>										
Partners / interdependencies										
<i>Development Control (Planning) , Planning Inspectorate, Borough Plan Advisory Committee, Design Review Panel, Mayor of London.</i>										
Service Objective 4					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Morden Town Centre Regeneration					Create a great place to grow up and live in					
					Bridge the gap and reduce inequalities					
					Build resilient communities					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
Secure external investment	-	Red	<i>Pending Homes England bid</i>	-	-	-	-	Quarterly	Yes/No	
Delivery of CIL improvement projects	0	Green	150,000	150,000	-	-	-	Annually	Low	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Strategic development framework</i>	<i>Morden masterplan / SDF as part of the new Local Plan</i>						<i>Complete</i>		<i>Complete</i>	
<i>Secure external investment</i>	<i>Funding bids to external agencies to underpin the project delivery (de-risk)</i>						<i>Nov-20</i>		<i>Mar-22</i>	
<i>Procure Development Partner</i>	<i>procurement of a delivery partner with TFL / Defining options for direct delivery and investment by</i>						<i>Apr-21</i>		<i>Jul-22</i>	
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
<i>Buy-in to local plan policies and scale of growth</i>					<i>Engagement with residents and cross-party Morden Regen group</i>					
<i>Securing external funding to underpin the project and launch to market</i>					<i>Joint LBM-TFL bids progressing with MHCLG Homes England</i>					
<i>Macro-economic factors affective development industry</i>					<i>Soft market engagement and competitive dialogue with bidders</i>					
Impact on the customer/end user										
<i>Regenerated Morden town centre will add vastly to the borough's housing stock, increase local tax base and provide a better town centre for residents.</i>										
Partners / interdependencies										
<i>Interdependencies: Transport for London, Mayor of London, MHCLG/Homes England. (as well as interal review of business case for LBM to intervene / invest directly to kickstart regeneration.</i>										
Service Objective 5					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Highways maintenance and network co-ordination					Statutory requirement					
					Maintain a clean and safe environment					
Performance Measures										

Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
Average number of days taken to repair an out of light street light	1.17 days	Green	3 days	3 days	3 days	3 days	3 days	Quarterly	Low	
Road emergency call outs (% attended to)	100%	Green	98%	98%	98%	98%	98%	Monthly	High	
Carriage way condition - unclassified roads defectiveness condition indicator	83.67%	Green	75%	75%	75%	75%	75%	Annually	High	
Footway condition (% not defective, unclassified road)	83.63%	Green	75%	75%	75%	75%	75%	Annually	High	
Streetworks permitting determined	100%	Green	98%	98%	98%	98%	98%	Monthly	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Footway & Carriageway Renewal	Capital Programme of planned maintenance						01-Apr-22		01-Apr-23	
Reactive Maintenance	Street inspector and customer feedback - reactive repairs						01-Apr-22		01-Apr-23	
Streetworks Permitting Team restructure	Reorganisation of Permitting and Streetwork Inspectors areas and duties - increased income						Complete		Complete	
Potential barriers to achieving objective										
Description of barrier					Mitigating Actions					
Supply chain issues due to Brexit					Monitoring via FMC monthly contract meetings					
Reductions in funding (DFT / TFL / LBM)					Review of permit fees for utility / construction works					
Impact on the customer/end user										
Highway, Footway maintenance, street lighting and winter maintenance ensures Merton's residents have a safe, well maintained and useable public highway.										
Partners / interdependencies										
FM Conway (Highway Services term contract) Utility Companies and developers permitted to work on LBM Highway. Roll out of FixMyStreet in 2022 will enhance customer journey for reporting road faults.										
Service Objective 6					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
TFL Local Implementation Plan, Traffic, Road Safety and Active Travel					Statutory requirement					
					Maintain a clean and safe environment					
					Create a great place to grow up and live in					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
Low Traffic Neighbourhoods	Complete	Not Yet Known	5	-	-	-	-	Annually	Low	
School Streets	Complete	Not Yet Known	28	-	-	-	-	Annually	High	
Cycle Hangers	Complete	Not Yet Known	10	-	-	-	-	Annually	Low	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										

Project / activity name		Description					Proposed start date		Proposed end date	
TFL Local Implementation Plan		https://www.merton.gov.uk/streets-parking-transport/lip3					01-Dec-21		01-Mar-23	
Targets all TBC pending TFL funding settlement										
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
TFL suspension and reinstatement of LIP due to Covid places greater pressure on delivery (Dec-April)					id priorities delivered. New LIP pending. CIL and ANPR income as potential supplement to TFL fund					
Impact on the customer/end user										
Road safety improvements, particularly in the vicinity of schools creates a safer healthier environment for all.										
Partners / interdependencies										
TFL, FM Conway.										
Service Objective 7										
Economic Recovery and Business Support					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the					
					Support our most vulnerable residents of all ages					
					Bridge the gap and reduce inequalities					
					Build resilient communities					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
Number of business premises improved	3	Green	10	10	10	0		Annually	High	
High Streets Task Group and Recovery Plan	-	Not Yet Known			-	-		Quarterly	Select	
Employment and Skills Partnership Activity	-	Not Yet Known		-	-	-		Quarterly	High	
Knowledge Exchange Hubs	-	Amber	1	1	0	0		Annually	Low	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name		Description					Proposed start date		Proposed end date	
Authority Monitoring Report		Annual report on Planning Policy, Housing and Economy					Nov-21		Nov-22	
Business Premises Improved		CIL funded programme of parade improvements (CIL allocated to 2023)					Apr-20		Apr-23	
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
Housing Target: barrier includes land availability and planning risk (higher density schemes)					Local Plan policies and site allocations mitigate some risk, ultimately PAC decisions.					
Employment and High Streets Recovery - too early to predict due to Covid					Watching Brief and liaison with partners					
Impact on the customer/end user										
Supporting jobs and economic recovery										
Securing LEAP investment via SLP London Councils										
Partners / interdependencies										
London Councils, South London Partnership, Merton Partnership, BIDs, Chamber of Commerce, GLA, MHCLG, Scrutiny Task Group, Job Centre+										

People

The team's staffing compliment is relatively stable reflecting the long-term nature of some of the team's projects. The team have adopted flexible working for both field workers (Highways) and office workers (now working at home). A phased return to the office in some format will need to be planned as some aspects of project collaboration, design functions and inter-team support with Development Control is better conducted in a face-to-face environment rather than 100% digital/remote. The team is likely to be under greater pressure to deliver homes and focus on greater design quality in planning applications. This requires more skills in Traffic Engineering, Transport Planning, Plan Making, Policy Development and Architecture and Urban Design that could be sourced in partnership with GLA Public Practice and funded through enhancements in the PreApp and PPA fee structures with Development Control. Major projects such as Morden Regeneration have been supported with existing staff respaces in the Local Plan team. As Morden Regeneration goes live, it will need a dedicated team and resource (business case to be developed).

Technology

Future Merton is a tech-savvy team with Mobile Working (Mayrise) embedded in Highways and recent improvements to software such as AutoCAD upgrades and Adobe Creative Cloud supporting greater design output for the team. There is a need for some laptop spec's to be improved to account for the increasing demand of these systems. The team regularly engages residents through consultations on Local Plan, Highways and Traffic schemes. Particularly in Traffic, the process is laborious, too email/letter based and we wish to explore systems that can fully digitise this element of our work. Systems exist such as Commonplace / SurveyMonkey/YourShout/Iceni type interfaces that are more engaging and provide stronger data analytics in the background. The Local Plan team also process a large number of data sets are port into the GLA on housing delivery. As 'Big-Data' across Planning in London grows, we may need support to allow/embed new web-based systems such as ViCity. With more people working at home, emails and attachments are increasing and fills up laptop memory quicker. Increase in OneDrive storage capacity has been welcomed.

Service improvement

For continuous improvement, the service would like to move forward in digitising how we engage/consult our residents on projects. Local Plan / Traffic / Regeneration schemes will require higher profile and more engaging web-presence. We'd also like to set up fully digitised online consultation process and portals for Traffic Schemes to minimise the amount of phone/letter/email/Member Enquiry/Complaints we receive. Member Enquiries are increasing as a result of residents and members engaging more digitally and via social media. Customer expectation on speed of response is misaligned with service standards and capacity to handle enquiries. Looking to 2022-3 it is anticipated that the outcome of YourMerton and post-pandemic recovery will centre on FutureMerton for delivery against Housing, Economy, High Streets, Public Realm, Climate Change and Traffic issues. Exact deliverables and projects remain TBC following the YourMerton engagement work.

Financial Summary - FutureMerton

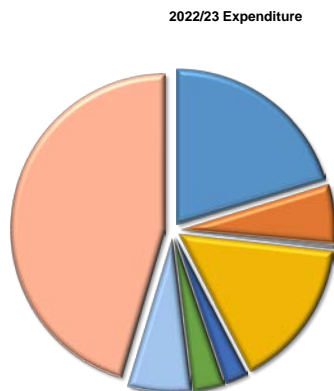
£70k saving relating to highways advertising income comes into effect in 2021/22, whilst some work funded from earmarked reserves is due to complete over the next year or two. The section will continue to incur unbudgeted costs until at least 2021/22 in relation to the redevelopment of Bishopsford Bridge.

In addition, the 2019/20 reprocurement of the highways maintenance contract has led to a general increase in unit costs against an historically insufficient budget, which will continue to cause a budget pressure in future years despite management efforts to keep costs to a statutory minimum.

Covid-19 has severely impacted on the section's ability to generate income, whether that be from street furniture advertising or rental & lettings income. However, no long term issues are expected. The team is also experiencing uncontrollable budget pressures such as increases in Electricity bills for Street Lighting and increases in TFL traffic signal costs via London Councils. The team budgets need adjusted to account for these corporate costs.

DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	14,589	16,283	15,126	117	15,153	15,136	15,191	15,253
Employees	2,858	3,363	3,298	(130)	3,075	3,082	3,088	3,095
Premises	896	1,046	903	128	931	944	956	970
Transport	61	36	51	(3)	51	52	53	54
Supplies & Services	2,588	3,021	2,405	146	2,361	2,318	2,349	2,384
3rd party payments	352	290	357		366	372	376	382
Transfer payments	0	0	0	(24)	496	496	496	496
Support services	1,092	1,646	1,231		991	991	991	991
Depreciation	6,742	6,881	6,881		6,881	6,881	6,881	6,881
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	2,778	4,112	3,198	31	3,373	3,373	3,373	3,372
Government grants	1	138	1	1	1	1	1	1
Reimbursements	813	1,719	1,140	156	1,275	1,275	1,275	1,275
Customer & client receipts	1,964	1,933	2,057	(126)	2,097	2,097	2,097	2,097
Recharges	0	322	0		0	0	0	0
Council Funded Net Budget	11,811	12,171	11,928	148	11,779	11,763	11,818	11,881



Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Highway Maintenance		6,122	9,537	(495)	5,082	4,460	4,420	4,380
Transport Improvement		2,680	3,201	(150)	4,905	2,200	2,000	0
	0	8,802	12,738	(645)	9,987	6,660	6,420	4,380

Summary of major budget etc changes

2022/23

Reserve = (£50k) - One Public Estate
 (£50k) = Additional income from planning performance agreements (PPA) for the contribution of specialist input in to major planning applications
 ENV2022-23 05 (£40k) = Increased income from street permitting through enforcement of utility works.
 ENV2022-23 02 (£35) = Raynes Park Sports Ground - new lease arrangement

ENV2022-23 07

2023/24

2024/25

2025/26

Service Plan for : Leisure & Culture Development Team

Service Manager:	Francis McParland	Cabinet Member:	Councillor Brenda Fraser: Cabinet Member for Culture, Leisure and Skills.
Peer review date:		Name of peer:	
Date created:	24-Nov-21	Date of next review:	

Overview of the service

Provide a brief overview of your service and the outcomes it seeks to provide for residents/service users, including any statutory duties that impacts on this

Main Activities:

The Leisure and Culture Team work to build and manage infrastructure and work in partnership with Service Providers to ensure that people can engage in healthy living and lifestyle changes through participation in sports, arts, cultural and physical activities and events. We lead and work with partners to increase the number, scope and quality of facilities, programmes, activities and events on offer.

Main Objectives:

- To develop long term action plans for the delivery of the Wimbledon Park Master Plan
- To manage the Leisure Centres Contract; Wimbledon Theatre Lease; Strategic Arts Grants including Polka Theatre
- To deliver core service functionalities including operation of Watersports Centre with its Statutory Duty under the Outdoor Adventure and Licensing Act
- To deliver core service functionalities including the operation of Morden Assembly Hall
- To implement actions arising from the Your Merton engagement exercise
- To oversee events and ensure they are both safe and successful. To Manage Mertons annual Firework event and to contribute to any Commemorative and Celebratory Events

Outcomes for residents / service users:

- Opportunities for improved physical and mental health and well-being
- Contributing to creating a great place in which to grow up and live
- Working to bridge the health and participation gap and reduce inequalities

Merton's ambitions

It is important that the activity in your service plan has a clear link to helping achieve the council's overall ambitions. Please consider these ambitions when developing your plan and ensure that activity and projects are matched against them:

Support our most vulnerable residents of all ages
 Support the Climate Change Strategy
 Create a great place to grow up and live in
 Support the Your Merton ambition of Maximising Greenspace Assets
 Support Strategies such as the Health and Wellbeing and Equalities Strategy
 Continuously improve

What do we need to do?

In developing your plan it is important to understand the wider context in which the service and the council operates. Please refer to Merton Data as a tool to help you understand the present and future demands on your service and the views and needs of its customers. This should be combined with local intelligence held by your service.

[Merton Data](#)

[The Merton Story](#)

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p>Your Merton We have learnt that the Environment and green spaces are more valued than ever. A place based vision must have people and communities at heart. We also learned that a healthy place can provide the physical and social conditions for all people to thrive. Participation in Sport The Sport England Active Survey 2017/8 shows that in Merton 40.3% of people 16+ participate in sport at least once a day, this compares favourably with London at 37.8% and England at 36.1%. The gender split in Merton is 42.6% male and 34.6% female.</p> <p>Physical Activity Active Residents in Merton: 58.7% - compared to London average: 57.8% and England average: 57%. Inactive Residents in Merton: 28% - compared to London average: 28.1% and England average: 28.7%.</p> <p>Sports Provision 84% of sports facilities in Merton are publicly accessible compared with London average: 57.6% and England average: 62.1%. Of this in Merton, 38% of sports facilities are owned by the authority.</p> <p>The Annual Residents Survey shows that: 70.2% of Merton residents are very / fairly satisfied with the local sports provision 66.1% of adults want to do more sport 41.8% of active adults want to do more sport. 27.8% of inactive adults want to do more sport.</p>	<p>Merton Statistics (The Borough Preferred Option (BPO) population projections are calculated using the Merton housing trajectory): Merton has a current population of with a current population in 2021 of 204,676, projected to increase to 210,416 in 2026 and 221,303 in 2036 (BPO projections dated March 2021) Over the next 15 years it is projected that the number of residents aged over 65 across Merton is projected to increase by a minimum of 43%. The population aged 85 and over is projected to increase by an even greater proportion, 52%. In 2020 the proportion of the Merton population from a Black, Asian & Minority Ethnic (BAME) background 36.9% compared to a London Average of 43.5%. The employment rate for Merton residents aged 16-64 is 81% compared to a London Average of 75.5% and an England average of 76.5%. The proportion of the Merton population with a registered disability is 11.7% (source Merton Hub) compared to a London Average of 17.2% and an England average of 21%. Self-reported health: The proportion of people in Merton who say their health is fair to very good is 96.1% compared to a London Average of 95% and an England average of 94.5%.</p>	<p>The only current statutory obligation is to run the Watersports centre under the Outdoor Activity and Licencing Act. Our services have been greatly affected by the Covid-19 pandemic and the varying Government Guidelines published at different stages of the pandemic. Our services and Leisure Service Providers have responded well to the imposed changes to ways of operating. This has been reflected in the customer confidence in using our facilities with attendance increasing week on week. Our Leisure Service Providers, GLL, are now recovering well and we will hopefully move to a pre-covid position contractually. Theatres were also heavily affected by the pandemic, we supported them throughout and supported them with Grants and joint Communications. Our Leisure and Culture provision has a vital role to play in tackling rising levels of obesity, inactivity and mental health issues.</p>	<p>We constantly review our services to ensure we are improving and meeting the council's strategic targets. The core staff team are responsible for strategic planning; major leisure projects; client-side management, performance monitoring; understanding public needs; contracting; commissioning; service agreements; compliance with public duties; generating income and reducing expenditure. Covid-19 had a huge impact on the services we provide. All services had to close during lockdown and this has had a significant impact on income. All with the exception of Morden Assembly Hall (MAH) are now operating and recovering the business position. MAH is being used as a Covid-19 Vaccination Centre at least until the end of this Financial year. Theatres are now open and business is good. Business Continuity and Business Recovery plans are updated regularly and we and our contractors (GLL) are able to react to changing scenarios very quickly, including close-down if required. We will continue to work flexibly, including working from home, using technology wherever possible. We focus on resident and customer needs, whilst driving down costs at the same time as generating as much income as possible. We will be increasing our partnership working with Service Providers and other stakeholders,</p>

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p>Provision of a Universal Service: We focus on two distinct strands of delivery:</p> <ul style="list-style-type: none"> • Commercial strand – Extending beyond the borough boundaries in the north and west. Expanding the range and number of our business partners, culture, leisure and sports providers providing products and services to generate surpluses including at the Watersports Centre where we are looking to generate income from both Merton and surrounding boroughs for anybody eligible to come along. COVID-19 adaptations will be reviewed on an on-going basis. We will continue to attract appropriate commercial events to the borough. • Community strand – Working to attract inward investment, external funding and then commissioning services to provide culture, leisure and sport benefits. 	<p>Health outcomes for people in Merton are generally better than those in London and largely in line with or above the rest of England.</p> <p>The predicted increased population will put considerable pressure on the borough's leisure and cultural facilities, playing pitches and open spaces as well as the community needs, facility types and provisions changing with the times / fads.</p> <p>To support the new Local Plan, the council commissioned studies to assess the quantity, quality, accessibility and availability of indoor and outdoor sports facilities in Merton. The Merton Playing Pitch Strategy (PPS) was adopted in October 2019 and the Merton Indoor Sports Facility Study (ISFS) was published in February 2020. These documents provide a strategic assessment and an up to date analysis of supply and demand for grass and artificial playing pitches and indoor sports facilities in the borough. They were carried out in line with Sport England's published guidance and in conjunction with a number of national sports governing bodies. The PPS identifies that Merton has significantly higher levels of "Active" participation compared with Outer London and England (Sport England Active Lives Survey) and playing pitches are generally well used throughout the borough. The value of participation in sport and physical activity is significant, and its contribution to the health, wellbeing and quality of life of residents should not be</p>		<p>strengthening partnerships that already exist and creating new ones to maximise the impacts and outcomes for our residents and customers, ensuring that they get the best access possible through professional and efficient interactions with all staff that represent and are responsible for our service delivery.</p> <p>The Watersports Centre will continue to work with our partners to offer much more tailored products, programmes and courses, generate income and still engage directly with our clients through social media. We will continue to bring in commercial events where appropriate and will work more closely with Friends Groups to gain buy-in, particularly with events.</p>

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
	<p>under estimated. The PPS also notes that residents will travel across and into neighbouring boroughs to access sports facilities. The PPS recommends that playing pitches are protected in the borough, to ensure there remains sufficient sports provision for the population.</p>		

Where are we now?

Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Develop plans for the delivery of the Wimbledon Park Master Plan	Work has concentrated on Flood Risk and will continue to do so in 2022. We will work with adjacent landowners and Friends Groups, so that the whole park can be developed in partnership. The work will be ongoing.	Carry forward
Manage Events	we will ensure any event applications are scrutinised for safety and passed to the SAG if necessary. We will bring appropriate commercial events to the borough and work with partners to put on the annual fireworks event.	Carry forward
Manage the Leisure Centres Contract; Wimbledon Theatre Lease; Polka and Attic Theatre's Grants	<p>Leisure Centres Contract - centres performing well since re-opening, particularly Morden Leisure Centre. We will continue to support GLL and work toward getting back to contract position position in 2022</p> <p>Polka Theatre reopening in Autumn 2021 went very well and will will work to support the Theatre</p> <p>New Wimbledon Theatre -We will support the Mayor's Office across other events where possible.</p> <p>Attic Theatre - another successful year bringing in significant match funding to deliver works across the borough, primarily in the east of the borough.</p>	Carry forward
LTA Funding	we will work with the LTA to produce a funding bid for tennis court improvements across the borough	Carry forward
Deliver core service functionalities including operation of Watersports Centre, Morden Assembly Hall	Watersports Centre has delivered a very good year and has done so in a Covid secure way. Morden Assembly Hall has been used at a vaccination centre and will continue to do so until April 2022. We will access the viability of MAH in 2022	Carry forward

How will we get there?

Try to limit this to no more than around 5-7 key objectives. This section should be reviewed if there are any significant changes in direction during the year. Changes can be noted along with the reasons for and implications of the change. When you review this, look for opportunities, insights, or risks that have emerged.

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
Manage the Leisure Management Contract for the borough's three leisure centres	Create a great place to grow up and live in

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2023/24 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
14 - 25 year old fitness participation at leisure centres	84,975	Not Yet Known	86,675	89,275	91,954	95,632		Monthly	High
Total number of users of Merton's Leisure Centres	1,029,183	Not Yet Known	850,000	892,500	937,125	937,125		Monthly	High

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
Facilities Fit for purpose	Capital investment made in the infrastructure of the building and plant	01-Apr-22	Ongoing
Financial Management	Monitor the financial performance with a view to the operators getting back to BAU	01-Apr-22	Ongoing
Users / Targeted Interventions	Local people access the facilities included some targeted interventions where this is required	01-Apr-22	Ongoing

Potential barriers to achieving objective

Description of barrier	Mitigating Actions
Finances	look to return to contractual arrangements ASAP.
Users expectations versus possibilities	Understand users expectations and ensure that where possible and appropriate these can be met
Lack of facilities at times users might want	Review programming to see if changes can be made

Impact on the customer/end user

Customers may not always get the outcome they would wish for as it might not be appropriate for some of the other users and/or the business

Partners / interdependencies

Operators and other agencies working to deliver their service outcomes through our Leisure Centres e.g. schools for school swimming lessons; public health for health and well-being programmes. GLL will look to work with Parks to run open air classes.

Service Objective 2	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
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Deliver a range of water sports activities and outdoor educational events in accordance with the Outdoor Adventure and Licensing Act and operate the Morden Assembly for financial and	Create a great place to grow up and live in Statutory requirement
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Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2023/24 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Income from Watersports Centre (£)	404,949	Green	385,000	385,000	385,000	385,000		Monthly	High

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
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Staffing	Recruit temporary contract staff and refresh the casual staff pool					Oct-21	Feb-21		
Programmes & Products	Establish products and programmes for the new season					Oct-21	Jan-21		
Equipment & resources	Procure new & repair existing equipment & resources for the new season					Oct-21	Mar-21		
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
Insufficient qualified staff applying to work					Recruit as highly qualified as possible and mentor or consider increasing pay to get qualified staff				
Programmes & products do not sell well					Review programmes and products and redevelop into more saleable services / products				
Delay in equipment arriving to site					Adjust programmes and products on offer so services can be run with existing equipment. Chase supplier for delivery.				
Impact on the customer/end user									
The service will continue to be provided at an appropriate cost and quality.									
Partners / interdependencies									
Human Resources - for recruitment of staff and finance for signing off budget and resources. Procurement - purchasing of equipment and goods. IT - for the CRM support for putting all the products on the CRM system and making sure it works efficiently and effectively throughout the year.									
Service Objective 3				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Develop solutions and implement plans to mitigate flood risk at Wimbledon Park Lake				Statutory requirement					
				Maintain a clean and safe environment					
Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2023/24 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Projects / key activities to support the objective <i>(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)</i>									
Project / activity name	Description					Proposed start date		Proposed end date	
Planning Approval	Develop compliant, affordable design within budget that gains a planning approval					Nov-20		Jun-21	
Build Solution before Jan 2022	Statutory Duty is that this Reservoir Safety compliance must be in place by 31 Jan 2022					Jun-21		Feb-22	
Deliver in Budget	Capital investment made in the infrastructure of the building and plant					Mar-18		Feb-23	
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
Scope creep by project team as opportunities arise that are originally out of scope					Opportunities register established as well as a Potential Issues register so that what is in and out of scope is clearly documented and understood.				
Objections at planning stage making planning approval more difficult to achieve or costly					Taking account of risk, opportunities and potential issues register; consulting with planning and all advisors as well as key stakeholders once initial design is in place				
Competing factors that delay timetable for build out - planning, weather, ecological, etc.					Planning to develop a design that can be built out in stages so that the building works can commence as early as possible allowing the greatest possible time for the build and to overcome any issues that might arise				
Impact on the customer/end user									
This flood attenuation scheme seeks to retain water in the lake and the park, rather than causing risk to flooding and risks to life and structures downstream of the lake. The benefits would be to those users downstream in the event of a flooding incident.									

Partners / interdependencies										
This project has a council-wide officer group with representatives from Finance, Legal, Planning, Procurement, Greenspaces, Future Merton, Insurance, etc. The Future Merton team's Flood Management Officers are jointly leading on this project with all the technical expertise. External partners are also engaged from landowners, Thames Water, Environment Agency, Historic England, LB Wandsworth, etc.										
Service Objective 4				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
Manage the Wimbledon Theatre Lease; Polka and Attic Theatre's Grants; Commission culture, arts and sports services where funding allows or with external funding				Create a great place to grow up and live in						
				Bridge the gap and reduce inequalities						
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2023/24 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
Total number of users of Polka Theatre	21,624	Green	22,500	23,000	23,500	24,000		Quarterly	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Receive and agree annual plans	Monitoring meeting to review and discuss						Apr-22		Jun-22	
Monitoring and payment of funds	Monitoring meeting to review and discuss followed by processes to pay funds						Apr-22		Mar-22	
Receipt of reports	Monitoring meeting to review and discuss followed by processes to pay funds						Jun-22		Apr-22	
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
Timeliness from both parties					Set dates and timelines early in the year					
Impact on the customer/end user										
The customer will benefit from our partnership working.										
Partners / interdependencies										
Property Team are involved in the Wimbledon Theatre Lease. Other departments including CSF and C&H are able to offer benefits to some of their clientele through these arrangements and partnerships that this team works with.										
Service Objective 5				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
Refresh the Arts Grants system, ensuring Elected Members are in charge of the Grant process				Create a great place to grow up and live in						
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/24 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
ensure a new process is developed		Not Yet Known	complete process	review process	review process	review process				
ensure grant money is distributed		Not Yet Known	distribute grants	all grants distributed	all grants distributed	all grants distributed				
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	

Ensure Grant team is in place	Establish meetings and process									Feb-22	
Potential barriers to achieving objective											
<i>Description of barrier</i>						<i>Mitigating Actions</i>					
Not a priority to other key people						Seek alternative solutions or address the priority levels					
No finances available						Seek alternative funding or scope activities to fit within available funds					
Impact on the customer/end user											
giving out a range of grants will enable a diverse amount of activities in all areas of the borough											
Partners / interdependencies											
Council departments and teams are called on to support activities where necessary. Particularly the Mayor's Office and often Highways, Waste Services and Parking Services, etc.											
Service Objective 6						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Develop plans for the delivery of the Wimbledon Park Master Plan						Create a great place to grow up and live in					
Performance Measures											
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2023/24 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity		
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)											
Project / activity name	Description						Proposed start date			Proposed end date	
Action Plan	Create action plan, prioritise and consult and finalise for approval						Jun-21			Dec-21	
Financial Plan	Create financial plan with proposed funding sources and timescales for applications						Dec-21			Mar-22	
Potential barriers to achieving objective											
<i>Description of barrier</i>						<i>Mitigating Actions</i>					
Competing demands and priorities						Ensure everybody is able to express their response and ensure they understand how priorities and demands will be ranked from the outset. The Master Plan is already agreed and in place to set that					
Finances not readily forthcoming from potential sources						Refresh the priorities to align with available funding and seek out funding specifically for the early priorities ensuring a planned and phased approach to implementation.					
Impact on the customer/end user											
Some customers and users will welcome the changes and delivery of the Master Plan, whilst others will not want the changes - all views will need to be fully considered in the process.											
Partners / interdependencies											
Customer Contact Centre and the Communications Team will be key in the consultation phases. The Greenspaces Team as the responsible team for the wider park and all that is delivered within the park, except for the Watersports Centre. The Watersports Centre staff. Wider external partners and neighbouring land owners.											

People

The Public Space Division is undergoing a transformational change across all areas and will be underpinned by a divisional restructure. We will regularly review Smarter working to ensure services are not hampered in any way.

We will build greater resilience and flexibility in the service, along with identifying any skills gaps which may be identified and relevant training and development support provided to staff and teams where appropriate. Both in house (where possible) and external training accessed (where required).

HR support required for:

- Recruitment, annual 8 month contracts etc.
- Trent paying casual staff
- Annual pay uplift and correct formula in pay claim forms for casual staff
- New staff to receive sufficient training and support for council specific courses and support for non-council training where identified for the needs of the business or employee

Facilities support and partnership working will be required for:

- The building needs e.g. weekly water testing, utilities issues, building/capital improvements across our portfolio
- Training for all staff for NGB qualifications to do their jobs and other identified needs e.g. from health and safety audits/inspections such as fire, legionella courses etc.

Finance and Procurement support required for and including project management tools:

- Procurement and access for project docs. outside the organisation

Finance support require for:

- Using E5 and other financial processes

Technology

We will work with IT to ensure the CRM system is compatible with Watersport booking. We will also explore Artifax to see if this is a preferred solution.

Smarter working is now a feature of working for London Borough of Merton. While much has been done to ensure IT accessibility for staff, if members of the Leisure and Culture Team will work remotely and also meet in the Civic Centre when appropriate.

Training on the full capabilities of the current systems and any new systems will be required to ensure the efficacy of the Team.

IT support required for:

- CRM system - malfunctions such as over booking, age checking etc.
- CRM system - duplication of course information to speed up creating new courses
- Working laptops for all full time staff and any other contracted staff as identified. Wifi for Watersport Centre to allow for easier access to systems.
- Access to and training on council systems such as E5, procurement protocols, SharePoint, ATS recruitment, DBS, etc.
- Support for staff working from home or non- council buildings

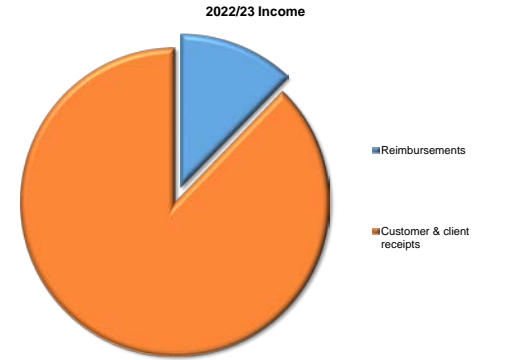
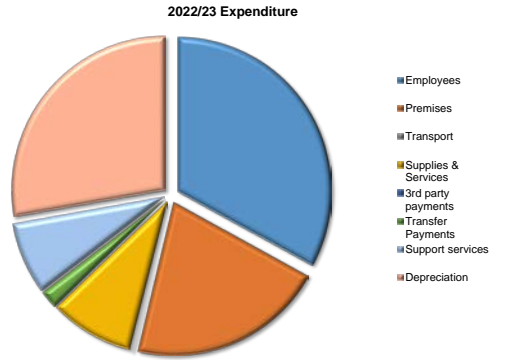
Service improvement

Service improvement will come from first of all the restructure. The restructure will provide a business and development function which will aid in customer service, reporting, documenting and project management functions which will increase efficiency and efficacy of the service. Use of Business intelligence and development of team Project Management skills will enable the service to improve.

Financial Summary - Leisure & Culture

Covid-19 severely impacted the section's budgeted income expectations, particularly Morden Assembly Hall, the Watersports Centre and the guaranteed income from leisure centres. The new variant is a cause for concern and could impact on income recovery in the last quarter of the financial year. No significant changes currently built into the MTFS.

DEPARTMENTAL BUDGET AND RESOURCES								
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	2,076	1,672	2,155	(149)	2,217	2,230	2,240	2,085
Employees	716	459	728	(85)	733	735	737	740
Premises	442	197	448	(52)	459	466	472	479
Transport	5	3	5	(1)	5	5	5	5
Supplies & Services	188	203	191	(10)	196	199	201	204
3rd party payments	0	0	0	(1)	0	-	-	-
Transfer Payments	0	0	0		42	42	42	42
Support services	170	194	167		167	167	167	
Depreciation	555	616	616		616	616	616	616
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	1,439	185	1,439	391	1,439	1,439	1,439	1,439
Government grants	0	0	0		0	0	0	0
Reimbursements	176	68	176	(103)	176	176	176	176
Customer & client receipts	1,263	117	1,263	494	1,263	1,263	1,263	1,263
Recharges								
Reserves								
Capital Funded								
Council Funded Net Budget	637	1,487	716	242	779	791	801	646
Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Morden Leisure Centre		50	0	0	0	0	0	0
Wimbledon Park		159	1,178	0	0	0	0	500
Other		208	410	0	250	250	250	260
	0	417	1,588	0	250	250	250	760



Summary of major budget etc. changes

2022/23

No significant changes.

2023/24

No significant changes.

2024/25

No significant changes.

2025/26

Service Plan: Parking

Service Manager:	<i>Ben Stephens</i>	Cabinet Member:	<i>Cllr Lanning</i>
Peer review date:		Name of peer:	
Date created:	<i>7th December 2020</i>	Date of next review:	

Overview of the service

Provide a brief overview of your service and the outcomes it seeks to provide for residents/service users, including any statutory duties that impacts on this

The section is responsible for:

- Implementing and manage a parking and permit charging structure that meets policy objectives. To ensure all parking facilities including 14 car parks within the borough along with the management of 400+ P&D machines, and payment solutions are working well and are easy to use by our customer. To manage cash collections and reconciliation and the management of cashless parking and IT systems to deliver the charging structure (Service objective 2).
- Enforce parking regulations across the borough including Controlled Parking Zones and bus lanes and moving traffic contraventions. and school street (Service objective 3).
- Management of all appeals to Parking Charge Notices (PCN)s issued and the processing of all Parking Permits including responsibility policies and processes to deliver the service (Service objective 3).

Desired outcomes and objectives

- Effective management and monitoring of an Emission Based Charging structure to contribute to key council objectives such as Public Health, Air Quality, Mayor's Transport Strategy and the Local Implementation Plan. To provide parking facilities and payment solutions which are working well and are easy to use by our customers (Service objective 2).
- To have an effective enforce policy and practices to manage the boroughs parking and moving traffic contraventions, through the use of Civil Enforcement Officer and ANPR, contributing to improve road safety and contributing to the traffic management objectives of the council (Service objective 3).
- To provide an excellent customer service in the management of Permit processing, PCN appeals and associated email and phone communications (Service objective 4).

Merton's ambitions

It is important that the activity in your service plan has a clear link to helping achieve the council's overall ambitions. Please consider these ambitions when developing your plan and ensure that activity and projects are matched against them:

- Support our most vulnerable residents of all ages
- Maintain a clean and safe environment
- Create a great place to grow up and live in
- Build resilient communities
- Bridge the gap and reduce inequalities
- Continuously improve

What do we need to do?

In developing your plan it is important to understand the wider context in which the service and the council operates. Please refer to Merton Data as a tool to help you understand

Merton Data		The Merton Story	
Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p>The service has a high number of transactions and interactions with customers and service users, with feedback and comments feeding into future processes. Circa 150,000 PCNs are issued, CEO commute with thousands more on a day to day basis, 40,000 post PCN communications (appeals) are received where customers often offer opinion or feedback on the service. A new permit system was recently introduced and issues raised during that period will feed into future improvements.</p>	<p>Merton has a population of 211,787. By 2030 the population is predicted to be 224,502 with car use continuing to increase.</p> <p>Changes in charges will have a direct effect on customer/driver behaviour, and effect will be monitored and action taken to address poor Air Quality, Climate Change and public Health and data and intelligence comes from these and transport related areas.</p> <p>Covid has had a large effect on the service, with reduced car parking, but high number of PCNs being issued. ANPR also has a downward effect. Forward projections remain under review.</p> <p>Parking is part of a wider traffic management agenda as set out in the LIP 3. Parking Trend data including Permit sales will feed into the ambitions of the LIP 3 agenda.</p>	<p>Parking Enforcement and associated appeal process is regulated under the Traffic Management Act 2004. Bus Lane Enforcement and the associated appeal process is regulated under the London Local Authorities Act 1996 (as amended by the 2000 Act) Moving Traffic Enforcement and the associated appeals process is regulated under the London Local Authorities and Transport for London Act (2003). The Government's green agenda may have effect on a local level. TfL funding for School Streets and associated sustainable transport policy may effect service provision.</p>	<p>With the growing financial pressures placed on Local Authorities the one thing that will remain constant will be the need to change. We will need to look across all services and identify new initiative ways of working and redesign services with the residents at the heart of the design process. This can be achieved through our vision and values in which we will build with our residents and partners, a sustainable community, dynamically positioning the directorate within the different communities to understand their needs and support them from an informed position. A greater sense of inclusiveness and belonging, building a larger cohort of engaged employees and residents.</p> <p>Engaging and energising local communities will be indispensable when it comes to developing a sense of ownership in local decision-making and service delivery. Standards will have been maintained / improved through peer pressure and engagement from residents rather than through micro management of functions provided by the authority.</p> <p>In order to achieve our vision, our relationship with our residents and partners will be tested. We currently operate within a parent child relationship with our residents in which the authority takes the lead role in providing all required services. Moving forward this relationship will change. Residents engage with what they feel part of and value what they help to build. We have a proven track record of implementing change at a strategic level and at a structural level (organisational) including process/operational change.</p> <p>The challenge now for the team will be to understand the impact at a cultural level (personal change) we have historically focused on supporting individuals through the change</p>

			<p>process and outplacement support when people have been required to leave the organisation. Moving forward we all have choices and for those that select to be part of this journey need to understand the challenges that we face and the high expectations required at both a team and individual level. As the directorate continues to shrink our human resource become a high valuable asset to manage. We will need to move away from a command and control style of management and structures and move towards a transformational style of leadership that empowers proactive teams.</p>
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Where are we now?		
Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Implement new Parking Charges Notice (PCN) system	Delivered.	Close
Implement new Permit system	Delivered.	Close
Implement new parking charges	Delivered.	Close
Review diesel levy and consult on emission based charging	<p>The Council is will no longer proceed with the scheme because it is recognised that many residents are, and will continue, to suffer economically as a result of the COVID-19 pandemic and other cost of living increases more generally. Travel patterns which shifted during the pandemic – including a reluctance to return to public transport – have continued longer than anticipated, with uncertainty as to when or whether they will return. Moreover, Merton has already observed a significant shift to cleaner, greener vehicles during the time emissions-based charging has been considered, potentially linked to London-wide policies such as the ULEZ charge, and borough initiatives implemented in Merton, including low traffic neighbourhoods and school safety zones, as well as the Air Quality Action Plan. The provision of new P&D machines is currently being reviewed.</p>	Closed

How will we get there?

Try to limit this to no more than around 5-7 key objectives. This section should be reviewed if there are any significant changes in direction during the year. Changes can be noted along with the reasons for and implications of the change. When you review this, look for opportunities, insights, or risks that have emerged.

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
Performance Measures	Continuously improve

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% of Permits applied/processed online	97.00%	Green	80%	98%	98%	99%		Monthly	High
% of PCN Appeals received online	82.33%	Green	65%	83%	84%	86%		Monthly	High
Blue Badge Inspections (cumulative annual figure)	0	Red	120	140	160	180		Monthly	High
Total cashless usage against cash payments at machines.	72.42%	Green	70%	75%	77%	80%		Monthly	High
Percentage of cases 'heard ' and won at ETA	78.50%	Green	75%	79%	80%	81%		Quarterly	High
Sickness - No. days per FTE (12 month rolling average).	19.48	Red	8	8	8	8		Monthly	Low

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
<i>Project / activity 1</i>	% of Permits applied/processed online -To continue to provide and offer service that make the online option easy and convenient to customers. To work with software suppliers ensuring latest technologies are in place. To offer assistance support and access to technologies through customer contact and access through libraries and other outlets.	2020	ongoing
<i>Project / activity 2</i>	% of PCN Appeals received online -To continue to provide and offer service that make the online option easy and convenient to customers. To work with software suppliers ensuring latest technologies are in place. To offer assistance support and access to technologies through customer contact and access through libraries and other outlets.	2020	ongoing
<i>Project / activity 3</i>	Blue Badge Inspections (cumulative annual figure) - To continue with customer engagement on street by CEO checking badges being used. To take legal action against individuals misusing badges and take other actions to reduce misuse through signs and social media.	2020	ongoing
<i>Project / activity 4</i>	Percentage of cases 'heard ' and won at ETA - Continue to monitor outcomes and reasons for decisions made by adjudicators. To feed results back into the PCN issue and appeal process.	2021	ongoing

Potential barriers to achieving objective	
Description of barrier	Mitigating Actions

% of Permits applied/processed online -(Project / activity 1)				To work with software suppliers ensuring latest technologies are in place. To offer assistance support and access to technologies through customer contact and access through libraries and other outlets.						
% of PCN Appeals received online - (Project / activity 2)				As above						
Impact on the customer/end user										
<i>Please highlight the anticipated impact on the customer/end user of carrying out the activity in your service plan.</i>										
Partners / interdependencies										
<i>Highlight any interdependencies where other council services or partner organisations are linked to the delivery of this objective. If referring to another council service, please include the name of the team and department.</i>										
Service Objective 2				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
To contribute to key council objectives such as Public Health, Air Quality, Mayor's				Statutory requirement						
				Create a great place to grow up and live in						
				Maintain a clean and safe environment						
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
n/a										
Projects / key activities to support the objective <i>(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)</i>										
Project / activity name		Description					Proposed start date		Proposed end date	
<i>Project / activity 1</i>		expansion of school street programmes to prevent unnecessary vehicular traffic in these areas at the start and end of the school day, reducing vehicle emission levels and improving road safety for residents and school children at these locations					<i>Nov-20</i>		<i>Ongoing</i>	
<i>Project / activity 2</i>		Low Traffic Neighbourhoods - Introduction of restricted routes at key locations to prevent road					<i>Nov-20</i>		<i>Ongoing</i>	
<i>Project / activity 3</i>		Anti-Idling - CEOs have received training on 'light touch' engagement with members of the					<i>Mar-21</i>		<i>Ongoing</i>	
<i>Project / activity 4</i>		Parking Sensors - being installed in a number of key locations and Blue Badge Bays to monitor activity and use					<i>Nov-20</i>		<i>Mar-22</i>	
<i>Project / activity 5</i>		Veracity Cameras - ANPR cameras that monitor traffic and monitor emissions to provide clearer assessments of emission levels					<i>Sep-21</i>		<i>Ongoing</i>	
Potential barriers to achieving objective										
Description of barrier					Mitigating Actions					
<i>School Streets - exemptions and schools unhappy with processes for them to add exempt vehicles</i>					<i>How to guide drafted and to be issued to all schools with follow up.</i>					
<i>Anti-Idling - Regulations to enforce currently limited.</i>					<i>Lobby government for more powers (via Air Quality team).</i>					
<i>Anti-Idling - Resources to enforce.</i>					<i>Review funding/grants from TfL</i>					

Impact on the customer/end user										
<i>Improved air quality, contribution to climate change, better public health. Cashless parking will have a direct effect.</i>										
Partners / interdependencies										
<i>Air Quality Team, Public Health, Future Merton (Transport).</i>										
Service Objective 3					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
To enforce the boroughs parking and moving traffic contraventions through Civil Enforcement officers and ANPR to improve road safety and contribute to the traffic management objectives of the council.					Statutory requirement					
					Create a great place to grow up and live in					
					Maintain a clean and safe environment					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
PI % of ANPR cameras remain working	<i>Not reported at corporate level</i>	NEW	97%	98%	98%	98%		Monthly	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Project / activity 1</i>	Ensure procurement of CCTV and ANPR meets the needs of the service						<i>Nov-20</i>		<i>Apr-21</i>	
<i>Project / activity 2</i>	Review existing enforcement locations and activity.						<i>Nov-20</i>		<i>Apr-21</i>	
<i>Project / activity 3</i>	School Streets - Exemption policy to be agreed and process to be implemented.						<i>Dec-20</i>		<i>Apr-21</i>	
<i>Project / activity 4</i>	Staffing requirement to deliver increased workload.						<i>Jan-21</i>		<i>May-21</i>	
<i>Project / activity 5</i>	Review existing policies of various types of moving traffic infringement, i.e., weight restrictions and clean air zones.						<i>Jan-21</i>		<i>May-21</i>	
Potential barriers to achieving objective										
						<i>Mitigating Actions</i>				
<i>100% increase in expected School Street PCNs, Reps and appeals</i>						<i>Ongoing work to address number of staff required to maintain service standards</i>				
Impact on the customer/end user										
<i>Improved air quality, contribution to climate change, better public health.</i>										
Partners / interdependencies										
<i>Air Quality Team, Public Health, Future Merton (Transport).</i>										
Service Objective 4					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
To provide an excellent customer service in the management of Permit processing, PCN appeals and associated email and phone communications.					Continuously improve					
					Support our most vulnerable residents of all ages					
					Statutory requirement					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
n/a										

Projects / key activities to support the objective (<i>provide a brief description of any projects / key pieces of work that will enable you to meet the objective</i>)			
Project / activity name	Description	Proposed start date	Proposed end date
<i>Project / activity 1</i>	To continue to improve services to meet and deliver on customer expectations.	<i>2021</i>	<i>2022</i>
<i>Project / activity 2</i>	Review current levels of satisfaction and undertake a structured assessment of themes and issuing arising, taking corrective action were possible.	<i>2021</i>	<i>2022</i>
<i>Project / activity 3</i>	To engage with customer, service users and stakeholders in developing technologies and solutions including additional online services, to make services and information more accessible and meet the needs of customers.	<i>2021</i>	<i>2022</i>
<i>Project / activity 4</i>	Develop a framework Equalities engagement.	<i>2021</i>	<i>2022</i>
<i>Project / activity 5</i>	PCN, Permits, technologies are required to provide an effective service. Recent upgrades and new systems have been implemented and the service will aim to develop these further to meet the customer expectations.	<i>2021</i>	<i>2022</i>
<i>Project / activity 6</i>	Review of Parking Policies to ensure service is delivering the requirements of the service and to facilitate customers' requirements.	<i>2021</i>	<i>2022</i>
Potential barriers to achieving objective			
<i>Description of barrier</i>		<i>Mitigating Actions</i>	
<i>Statutory/regulated process</i>		<i>To innovate within existing regulation.</i>	
Impact on the customer/end user			
<i>Improved customer experience.</i>			
Partners / interdependencies			
<i>Air Quality Team, Public Health, Future Merton (Transport).</i>			

People

1. Home working is fully functional. Potential increase in workload during 2021/22 (School Streets) may result in additional staff to process cases and deal with PCN appeals. (data shows there has been a 100% projected increase in the number of representations and appeals in relation to the School Street Schemes. Action is being taken to increase resources and manage the workload)
2. Ensuring access to training, coaching and mentoring to further develop staff skills in project management, management of grant funding, developing partnership strategies and action plans to deliver new projects.
3. Staff learning and development plans will consider areas for improving the use of IT platforms such as teams, zoom and other platforms that enable collaborative working, interactive community engagement and consultation.

Technology

1. Increased use of ANPR tech to enforce school streets
2. New Body Worn Video to be implemented which will support H&S requirements
3. New Radio Solution to be purchased and implemented for H&S
4. Develop the use of GIS for data analysis.

Service improvement

1. PCN Appeal process and debt collection. Consider how to improve response time to appeals received, through staff resources and use of IT systems.
2. Develop a policy/process framework to ensure customers have good communication and access to information and services particularly in respect of PCN appeals and Permit enquiries.

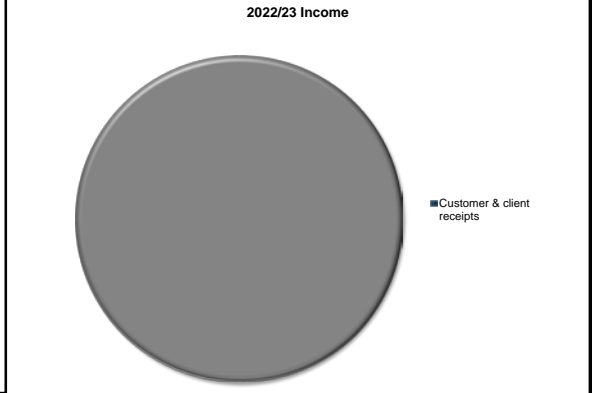
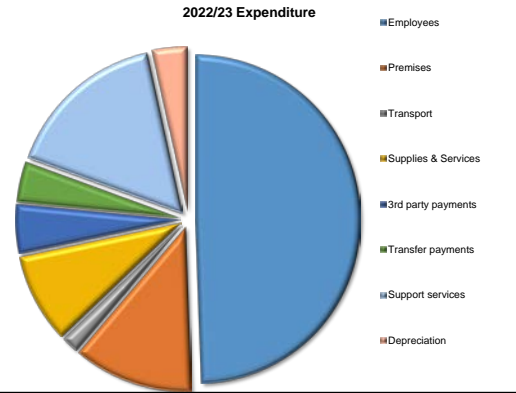
Financial Summary - Parking Services

The application to change Merton's PCN charge band, from band B to band A, has been submitted to and approved by The Mayor of London. It is currently with the Secretary of State for approval. Implementation is expected in February/ 2022 at the earliest, whilst a rejection will void the any saving. In addition, car park improvements work funded from earmarked reserves were due to complete this year, but delays have resulted in the works being completed in 2021/22.

The Council is recommending to no longer proceed with the scheme because it is recognised that many residents are, and will continue, to suffer economically as a result of the COVID-19 pandemic and other cost of living increases more generally. Travel patterns which shifted during the pandemic – including a reluctance to return to public transport – have continued longer than anticipated, with uncertainty as to when or whether they will return. Moreover, Merton has already observed a significant shift to cleaner, greener vehicles during the time emissions-based charging has been considered, potentially linked to London-wide policies such as the ULEZ charge, and borough initiatives implemented in Merton, including low traffic neighbourhoods and school safety zones, as well as the Air Quality Action Plan.

Covid-19 has severely impacted on the section's income, for example, permit and P&D. It should also be noted that from 2020/21 the section has a £3,800k budget expectation relating to the review of parking charges, which were designed to influence motorists' behaviour and reduce the use of the motor car. It is too early to tell exactly how behaviour has been affected, which is being compounded by the impact of Covid-19, but this could impact on budgeted expectations.

BUDGET AND RESOURCES								
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	6,286	6,299	6,472	(103)	6,841	6,865	6,887	6,912
Employees	3,132	3,021	3,227	(72)	3,382	3,382	3,382	3,382
Premises	906	801	784	(3)	804	816	826	838
Transport	128	136	126	27	115	117	118	121
Supplies & Services	422	499	475	(49)	602	608	614	622
3rd party payments	250	250	254	(6)	332	337	341	346
Transfer payments	0	0	0		271	271	271	271
Support services	1,226	1,355	1,369		1,097	1,097	1,097	1,097
Depreciation	222	237	237		237	237	237	237
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	22,125	13,281	23,518	4,485	23,039	23,685	23,574	23,463
Government grants		22						
Reimbursements	0		0	(4)		0	0	
Customer & client receipts	22,125	13,259	23,518	4,489	23,039	23,685	23,574	23,463
Recharges								
Reserves								
Capital Funded								
Council Funded Net Budget	(15,839)	(6,982)	(17,046)	4,382	(16,199)	(16,820)	(16,687)	(16,551)



Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Parking Improvements		5	745	(25)	855	300	360	300
	0	5	745	(25)	855	300	360	300

Summary of major budget etc. changes	
	2022/23
	ENV1819-04 = (£14k) - reduction in number of P&D machines. ENV2021-04 = (£750k) - Emissions based charging. ENV2021-08 = (£100k) - Activity to improve On Street parking compliance. ENV2022-23 04 = (£489) - Continue to enforce School Street locations through ANPR camera enforcement.
	2023/24
	ENV2021-03 = (£100k) - back office efficiencies. ENV2021-04 = £600k - Emissions based charging. ENV2022-23 04 = (£111) - Continue to enforce School Street locations through ANPR camera enforcement." □ □
	2024/25
	ENV2021-03 = (£50k) - back office efficiencies. ENV2021-04 = £575k - Emissions based charging. ENV2022-23 04 = (£111) - Continue to enforce School Street locations through ANPR camera enforcement." □ □ □ □
	2025/26

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Service Plan for : Parks & Green Spaces

Service Manager:	John Bosley, Assistant Director Publicspace	Cabinet Member:	Councillor Natasha Irons
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Overview of the service

Provide a brief overview of your service and the outcomes it seeks to provide for residents/service users, including any statutory duties that impacts on this

The Parks & Greenspaces service provides outdoor leisure and recreational benefits for residents and visitors of Merton, delivering both health and relaxation opportunities for all, and manages some of the most important landscapes and landscape features that comprise the borough's Public Space.

Areas of service include:

- Maintaining and developing Merton's numerous and diverse parks and open spaces (some 117 separate sites), is a key objective of the division, including the management of sports facilities and pavilions, gardens, children's playgrounds (more than 40), and Merton's cemetery and allotments services.
- The Greenspace portfolio also includes support for, and the production of a varied programme of outdoor events, ranging from community picnics to large commercial events, including music festivals, the annual civic fireworks shows and the Wimbledon (tennis) Championships, amongst others.
- The Parks & Greenspaces team manage more than 50,000 Council-owned trees, including 17,000 street trees, maintains some 1,500 highways verges and several urban nature reserves.
- The team also serves as the managing agent for Mitcham Common (on behalf of the Mitcham Common Conservators) and for Merton and Sutton Joint Cemetery (for the Merton and Sutton Joint Cemetery Board).
- The ground maintenance elements of the service are currently commissioned to Idverde UK Limited under a long-term contract (up to 24 years from 2017) and this contract and the contractor's delivery performance is overseen by the Neighbourhood Client Team in conjunction with the Greenspaces Team, who in addition, have overall responsibility for the strategic deliverables of the service.

Merton's ambitions

It is important that the activity in your service plan has a clear link to helping achieve the council's overall ambitions. Please consider these ambitions when developing your plan and ensure that activity and projects are matched against them:

- Support our most vulnerable residents of all ages
- Maintain a clean and safe environment
- Create a great place to grow up and live in
- Build resilient communities
- Bridge the gap and reduce inequalities
- Continuously improve

What do we need to do?

In developing your plan it is important to understand the wider context in which the service and the council operates. Please refer to Merton Data as a tool to help you understand the present and future demands on your service and the views and needs of its customers. This should be combined with local intelligence held by your service.

[Merton Data](#)

[The Merton Story](#)

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
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<p>The services that comprise the Greenspaces portfolio cover the entire range of potential users and all of the diverse communities of the borough.</p> <p>Recent research carried out in 2021, as part of the Your Merton consultation (source: https://www.merton.gov.uk/system/files?file=our20merton_execsum20nov2021.pdf), showed that greenspaces are the asset that residents most liked about their local area (pg4).</p> <p>The value and benefits of the Borough's Parks and Green Spaces in terms of the physical and mental health and well-being of communities and individuals is supported by residents reporting an increased appreciation for their local parks during the pandemic (pg5).</p> <p>It was also noted that resident felt that parks could be used to generate more income for the borough (pg9).</p> <p>Service user feedback and behaviour during this time has raised the high value that residents place on our park facilities such as playgrounds, sports facilities and outdoor gyms.</p>	<p>Merton has a current population of 211,787, with an approximate 50/50 gender split. By 2030 the population is predicted to be 224,502 again with an approximate 50/50 gender split (source: https://data.merton.gov.uk/population/).</p> <p>Demand for Greenspaces services is expected to increase with the anticipated rise in the population of the borough.</p> <p>In Merton, overall life expectancy at birth is longer than the England average, but there is a difference between the most and least deprived areas within the borough. In general, the East of the borough is younger, household incomes and economic activity are lower, people are ethnically more diverse and with relatively lower levels of education outcomes than the West.</p> <p>There will be new and rising needs and pressure points across the borough based on the differing demographics with services and facilities required to be tailored to provide benefit the local customers they serve. This is particularly important in the East of the borough where transport access is limited and residents therefore have less chance to travel to access the services and facilities they require.</p> <p>Some of the services that will need to be reviewed are playgrounds provision (children & young people); allotments (currently favoured by older & retired residents, but with the opportunity to promote the health benefits to young people and families); burial plots (some BAME communities).</p>	<p>The experiences of the 2020/21 national lockdowns demonstrated the value of the Greenspaces service to the community. As outdoor services, they were not subject to the same stringent control measures and constraints as many community services were at that time: whereas indoor gyms remained closed for many weeks. Local parks became a focus for health and exercise and were encouraged, including by national government, to be used for such purposes.</p> <p>Parks facilities continue to be run in accordance with relevant guidance, legislation and best practice:</p> <ul style="list-style-type: none"> • Playgrounds and sports facilities are inspected 3 times a week and inspected independently by ROSPA annually. • Pavilions and other buildings are managed on our behalf by Facilities Management who ensure all statutory testing (such as asbestos) is up to date and current 	<p>The Parks & Green Spaces service area is a highly valued and popular community service as demonstrated through recent local surveys, including the biennial borough resident's survey. Parks, playgrounds, outdoor gyms and allotments contribute substantially to the physical and mental well-being of our residents and some of our venues and activities encourage visitors from outside of the borough, thereby contributing economic benefits. Merton prides itself in being a green borough and its green spaces are commonly cited as part of its appeal as a place to live and work.</p> <p>The environmental, economic, social and well-being benefits of good quality and diverse green spaces and their allied services are well documented and are pivotal to the regeneration and continuing relevance of Merton. Furthermore, the service will continue to produce supporting strategies over the course of the year to enable the service to meet the future demands. These include the Tree Strategy (already underway) and a Parks and Greenspaces Strategy.</p> <p>What The Parks & Green Spaces Team are doing to help towards becoming London's best council:</p> <ol style="list-style-type: none"> 1) For residents and service users: We listen to and act on feedback from parks users. We work diligently to ensure the service is delivered in an efficient and frugal manner, ensuring best value. We are working to create an asset database so that a rolling maintenance programme can be developed in order to reduce reliance on reactive maintenance issues. 2) For our partners: We are a team that knows our stakeholders, engages with them, works well as part of a team with them, one that creates more than the sum of the parts where partnership working is natural and delivers great outcomes.
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			<p>3)For us: It is important that team members think that Merton is a council that is good to work for, where they want to stay and get things done. A council that promotes team work and gets the basics right e.g. appraisals, training, development and good communications. It is also a council that goes the extra mile in helping us maintain good health and well-being.</p>
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Where are we now?		
Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Greenspaces Target Operating Model (TOM): Review of Target Operating Model for Greenspaces	Progress made on a number of TOM objectives. Those objectives that are not yet completed will mostly be carried forwards, even if in a modified format or context. It is important to note that the IT integration objectives have not been a corporate or departmental priority, however it is still intended to be carried out in due course. The new Events booking system has been implemented however. A review of the TOM will take place in the coming year with the recruitment of the new Head of Parks.	Carry forward
Greenspaces Commercialisation: Maintaining sustainable commercialisation across a range of Greenspaces services and open spaces	Following the recent pandemic, there has been some recovery of commercial activities within our greenspaces. There is a business recovery plan within the division (link), which is reviewed on a regular basis.	Carry forward
Canons House & Grounds Restoration: Delivery of Lottery-funded Canons restoration project	Both contracts (landscape and building) completed in Spring / Summer 2021. Community engagement and skills development form a key aspect of the project moving forward (activities and events). Future Merton are in the process of procuring occupants for the business spaces in the house and cafe proprietor.	Carry forward

<p>Phase C, Lot 2: Embedding new systems & processes and ensuring quality & performance standards in relation to Phase C, Lot 2 grounds maintenance contract.</p>	<p>Following the implementation of the Target Operating Model for Street inspections, 60% of the streets in the borough are being inspected as a minimum, monthly, and this includes the quality of maintenance of the highway verges.</p> <p>In addition to the regular PQMS scoring, the Neighbourhood Team are also inspecting one park in every ward, once a month on a rolling basis. All of this data is reported on a weekly and monthly basis.</p> <p>The Parks Development Team are in the process of conducting a full audit of all assets in LBM parks to support a rolling asset maintenance programme moving forward.</p>	Carry forward
<p>Re-use of Parks Assets: Re-use of surplus and redundant parks facilities and re-modelling of under-utilised properties: pavilions, yards & mess rooms and other parks assets</p>	<p>Further progress has been made in relation to introducing third party investment and leasing of properties, in two locations, with different methodologies. This will benefit future development of sports and building provision at these sites.</p> <p>There is also the support of the Playing Pitch Strategy which was launched in 2019 to enable strategic decision making around parks pitches.</p>	Carry forward
<p>Revision of Arboricultural Services: Reconfiguration of current arboricultural service provisions, systems and policies. Re-procurement of arboricultural operational service. Increased tree planting.</p>	<p>The Arboriculture contract is out for Tender (Dec '21). SQ phase complete and currently at the full tender stage. Arb submission deadline: 21st December with Evaluation to take place in Jan 22.</p> <p>LBM has been successful in rounds 2 and 3 for funding from the Urban Tree Challenge (Forestry Commission). This will enhance the previous scheduled tree planting.</p>	Carry forward

How will we get there?

Try to limit this to no more than around 5-7 key objectives. This section should be reviewed if there are any significant changes in direction during the year. Changes can be noted along with the reasons for and implications of the change. When you review this, look for opportunities, insights, or risks that have emerged.

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
Parks Friends and Key Stakeholder Engagement	Build resilient communities
	Create a great place to grow up and live in
	Maintain a clean and safe environment

Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of friends & similar groups undertaking voluntary activities within parks & open spaces	28	Red	41	30	31	32	33	Annually	Within a range

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)			
Project / activity name	Description	Proposed start date	Proposed end date
<i>Project / activity 1</i>	Establish Parks & Greenspaces Community Stakeholder Forum	Apr-22	Ongoing
<i>Project / activity 2</i>	Stakeholder input to Park Management Plans	Apr-22	Ongoing

Potential barriers to achieving objective	
Description of barrier	Mitigating Actions
changing priorities for groups, single action then hibernate	

Impact on the customer/end user
Please highlight the anticipated impact on the customer/end user of carrying out the activity in your service plan

Partners / interdependencies
Highlight any interdependencies where other council services or partner organisations are linked to the delivery of this objective. If referring to another council service, please include the name of the team and department.

Service Objective 2	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
Canons House & Grounds Restoration Project	Create a great place to grow up and live in
	Maintain a clean and safe environment
	Bridge the gap and reduce inequalities

Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)			
Project / activity name	Description	Proposed start date	Proposed end date
<i>Project / activity 1</i>	Business Plan development on hold due to current market conditions. Market Testing underway	Jan-22	Mar-22
<i>Project / activity 2</i>	Canons House letting - Market Testing underway	Jan-22	Mar-22
<i>Project / activity 3</i>	Re-occupation of attic flat by tenant	Jul-21	Jan-22

Project / activity 4		Finalise site management and maintenance						Jan-22	Mar-22
Project / activity 5		Cafe letting. Market Testing underway						Jan-22	Mar-22
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
Stakeholder involvement						Consultation & participation			
Funding constraints via NLHF						Ongoing review with NLHF			
Impact on the customer/end user									
Comprehensive improvement of the open space and historical house, including new playground, a new cafe, educational/museum provisions and access to Canons House.									
Partners / interdependencies									
Various community partners & stakeholders which are being expanded and progressed by the Community Engagement Officer; National Lottery Heritage Fund and National Lottery Community Fund.									
Service Objective 3				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Upgrading Outdoor Water Play Facilities				Create a great place to grow up and live in					
				Maintain a clean and safe environment					
Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Project / activity 1	Procure and install Wimbledon Park Paddling Pool						May-23	Mar-24	
Project / activity 2	Procure and install a replacement programme for traditional style paddling pools						May-22	Mar-23	
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
Impact on the customer/end user									
Improved outdoor water play facilities in our parks; greater enjoyment for children.									
Partners / interdependencies									
Parks friends groups; relevant Ward Members.									
Service Objective 4				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Arboricultural Services Review & Restructure				Maintain a clean and safe environment					
				Create a great place to grow up and live in					
				Select					
Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of street trees planted	328	Green	240	245	250	255	260	Annually	Within a range
% of tree works commissions completed within SLA (30 working days)	94	Green	86%	87%	88%	89%	90%	Quarterly	Within a range
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Project / activity 1	Develop Tree Strategy with a focus on Council-owned trees (Phase 1)						Nov-21	May-22	

Project / activity 2	Enhancement to tree planting programme						Apr-22	ongoing	
Project / activity 3	Evaluation of Tender submissions for Arb Contract						Jan-22	Jan-22	
Project / activity 4	Mobilisation of new Contract								
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
Impact on the customer/end user									
Customers will experience a more obviously cyclical pattern to the management of the street tree stock in their neighbourhoods.									
Partners / interdependencies									
Barkland Tree Specialists (our current tree management contractor); Borough Tree Wardens; Ward Councillors.									
Service Objective 5				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Service Commercialisation				Create a great place to grow up and live in					
Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
Number of outdoor event-days in parks	299	Green	200	200	220	230	250	Quarterly	Within a range
Income from outdoor events in parks	609,153	Green	550,000	560,000	570,000	580,000	580,000	Quarterly	Within a range
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date	Proposed end date		
Project / activity 1	Member approval of commercial approach surrounding large events					Apr-22	Ongoing		
Project / activity 2	Update and roll out of commercial events strategy					Apr-22	01/04/2023 review		
Project / activity 3	Implementation and continued rollout of new events booking system Artifax - look at other services who can benefit					Jan-22	Ongoing		
Project / activity 4	Consider leasing sites to private operators on long-term lease					Apr-22	Ongoing		
Project / activity 5	Commercialisation of other assets within parks, eg. Coffee stalls and vendors					Apr-22	Ongoing		
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
Ongoing Government						Ensure events are passed by SAG so they can go ahead where possible			
Senior managers/members may not approve commercial strategy						Paper written to present to Members to get buy in for commercial strategy			
Demand for our spaces may not come to fruition (e.g. competition, sites not being fit for purpose, infrastructure etc.)						Conduct review of our sites against our competitors to ensure they are appealing to events organisers - flag any areas where development /investment is needed			
Impact on the customer/end user									
Increased number of activities and events in our green spaces - improved well-being. Large events can have a positive impact on local businesses in the surrounding areas (increased footfall).									
Partners / interdependencies									
Prior to restructure, Support needed from leisure team to manage the events logistical and management process - e.g. manage enquiries, process applications, invoice, conduct safety checks, SAG, review paperwork and refund deposit. Support needed From IDV to carry out site inspections, ground repair and maintenance of sites.									
Service Objective 6				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					

Phase C, Lot 2 contract management review			Maintain a clean and safe environment						
			Create a great place to grow up and live in						
			Continuously improve						
Performance Measures									
Indicator	2020/21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% of residents (all service users) rating parks & green spaces good or very good (ARS)	No residents survey in 2020/21	Does Not Apply	78%	79%	80%	81%	82%	Biennially	High
Young people's % satisfaction with parks & green spaces (ARS)	No residents survey in 2020/21	Does Not Apply	86%	87%	88%	89%	90%	Biennially	High
Number of Green Flag Awards	6	Green	7	7	7	7	7	Annually	High
Average Performance Quality Score (Grounds Maintenance Standards Overall)	4.94	Green	4.9	4.9	4.9	4.9	4.9	Quarterly	Within a range
Average Performance Quality Score (Grass Verge Standards)	4	Red	4.5	4.5	4.5	4.5	4.5	Quarterly	Within a range
Average Performance Quality Score (Litter & Cleansing Standards)	5	Green	4.95	4.95	4.95	4.95	4.95	Quarterly	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Project / activity 1	Implementation of new inspection regime of street verges and parks by Neighbourhood Client Team						Nov-21	Ongoing	
Project / activity 2	Parks Asset Audit by Parks Development Team						Dec-21	Apr-22	
Project / activity 3									
Potential barriers to achieving objective									
Description of barrier					Mitigating Actions				
Lack of investment in existing & new facilities & assets					Annual capital investment programme in parks & open spaces				
Unsatisfactory contractor performance					Effective contract performance monitoring				
Ineffective contract performance management					Allocate & deploy adequate contract monitoring resources				
Impact on the customer/end user									
Please highlight the anticipated impact on the customer/end user of carrying out the activity in your service plan.									
Partners / interdependencies									
Highlight any interdependencies where other council services or partner organisations are linked to the delivery of this objective. If referring to another council service, please include the name of the team and department. Idverde UK Limited (our grounds maintenance contractor).									

People

The Public Space Division is undergoing a transformational change across all areas and will be underpinned by a divisional restructure. Our staff are our greatest asset we will regularly review Smarter workign arrangements to ensure that staff are empowered to do their jobs in a way that can be flexible enough to meet their work-life balance requirements while ensuring that service delivery is not hampered in any way.

The focus of this is to ensure that we build greater resilience and flexibility in the service, along with identifying any skills gaps which may be identified and relevant training and development support provided to staff and Teams where appropriate. Both in house (where possible) and external training accessed (where required).

Technology

Over the last year, the IT provision and support has improved a great deal, allowing for greater flexibility and connectivity to support home working (Smart Working). The current systems however, are designed to support desk-based staff and are not suited to work undertaken in the field. The CRM system has limited capability for reporting some Parks and Tree issues online, however this is not user friendly and not fully integrated. This results in a high-level of transactions being undertaken manually and many service users emailing team members directly.

The service is currently testing the Fix My Street pro application which will enable both residents and client officers to log service requests in real time support by GPS location pins to identify the exact location of the service request. In addition to this functionality any new application will be required to integrate directly with our own CRM system along with providing the management team with service reports, heat maps and response time summaries.

It is highly likely that working from home will become a much larger feature of working for London Borough of Merton, and the team are working within the wider SMARTER working framework, meaning officers are field based, home workers or office based. This flexibility will allow officers to carry out site visits and inspections as well as carry out effective in-person and virtual meetings with colleagues and stakeholders.

Training on the full capabilities of the current systems and any new systems will be required to ensure the efficacy of the Team.

Service improvement

The restructure will provide a business and development function which will aid in customer service, reporting, documenting and project management functions which will increase efficiency and efficacy of the service.

A new operating model and reporting for contract monitoring inspections of parks (in addition to PQMS inspections) has already been positively received and there is scope to develop and increase this across additional elements of the contract.

There is a distinct lack of technology integration involved within the Idverde contract (excluding the PQMS system). A software package is required to coordinate, monitor and control the way instruction and communication is shared between ourselves and idverde. At present all communication is via email which doesn't assist with continuity or efficiency.

Financial Summary - Greenspaces

Covid-19 has severely impacted on the section's ability to generate income, namely events income.

The section has continuing budget pressures in relation to P&D income within certain parks, and the cyclical nature of arboricultural work. The contractual Annual Review process of the grounds maintenance contract also has the potential to create future budget pressures.

A 50% reduction to the grant for Deen City Farm has been built into the MTFS.

DEPARTMENTAL BUDGET AND RESOURCES

Additional Expenditure Information

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	4,259	4,886	4,648	66	5,021	5,066	5,106	5,152
Employees	477	526	465	30	465	465	465	465
Premises	636	693	612	(3)	927	937	945	954
Transport	35	12	16	(4)	16	16	16	17
Supplies & Services	308	269	313	(10)	318	323	327	332
3rd party payments	2,041	2,186	2,081	53	2,133	2,164	2,192	2,223
Transfer payments	0		0		108	108	108	108
Support services	426	483	445		337	337	337	337
Depreciation	336	717	716		716	716	716	716
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	2,392	2,080	2,369	(114)	2,443	2,443	2,443	2,443
Government grants	8	8	8		8	8	8	8
Reimbursements	423	637	400	(94)	400	400	400	400
Customer & client receipts	1,961	1,435	1,961	(20)	2,036	2,036	2,036	2,036
Recharges								
Reserves								
Council Funded Net Budget	1,867	2,806	2,279	(48)	2,578	2,623	2,663	2,708
Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Parks Investment		1,562	1,538	(36)	792	550	300	300

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Service Plan for : Property

Service Manager:	Jacque Denton	Cabinet Member:	Tobin Byers
Peer review date:	01/12/2020	Name of peer:	Graham Close
Date created:		Date of next review:	Oct-22

Overview of the service

Provide a brief overview of your service and the outcomes it seeks to provide for residents/service users, including any statutory duties that impacts on this

- To ensure that all property transactions provide value for money and comply with statute.
- To maintain an accurate record of the property assets of the council and to provide asset valuations to support the council's accounts (Section 151).
- To manage the councils commercial property portfolio to maximise income, managing the council's asset base to ensure that it has the accommodation necessary to support its services at a standard it can afford.
- To support regeneration, deal with occupation of council land by Gypsies and Travellers and to attend and provide timely advice to the Property Asset Management Board to deliver a programme of property sales to maximise capital receipts and acquisitions to improve revenue income.
- Community Right to Bid - to manage applications for community assets to be listed and claims for compensation.
- To maintain publicly available list of property assets as required by transparency agenda under Localism Act 2011. The service plan will lead to increased efficiency, the possibility of acting for other authorities on specialisms, and most significantly driving economic development and regeneration through closer working with Future Merton. This may impact on the timing of sales and capital receipts.

Objectives:

- Complete Asset Valuations to timetable agreed with Director of Corporate Services
- Implement review of non-operational property to maximise revenue income
- Critically examine operational property to ensure the council has the minimum necessary to support the business plan
- Maximise revenue income by letting vacant property
- Provide timely advice to inform regeneration projects
- Ensure team is arranged to support objectives

Merton's ambitions

It is important that the activity in your service plan has a clear link to helping achieve the council's overall ambitions. Please consider these ambitions when developing your plan and ensure that activity and projects are matched against them:

Support our most vulnerable residents of all ages
 Maintain a clean and safe environment
 Create a great place to grow up and live in
 Build resilient communities
 Bridge the gap and reduce inequalities
 Continuously improve

What do we need to do?

In developing your plan it is important to understand the wider context in which the service and the council operates. Please refer to Merton Data as a tool to help you understand the present and future demands on your service and the views and needs of its customers. This should be combined with local intelligence held by your service.

[Merton Data](#)

[The Merton Story](#)

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p>The service has two categories of customers. The first are internal and comprise of the Council and its departments. The second are external and comprise the residents and businesses/commercial tenants of the borough and Merton and Sutton Joint Cemetery Board. The satisfaction of external customers is monitored upon tenancy change. The satisfaction of internal customers was sought through a satisfaction survey in January 2018 (30% return). All returns confirmed internal customers were satisfied or better and the survey will be repeated next year subject to any restrictions from Covid 19. Consideration will be given to whether there are areas of this service which require Equalities Analysis Assessments.</p>	<p>It is unlikely that the demand for this service will change unless the council disposes of its property and this seems very unlikely. There remains a possibility that the Weir Road industrial estate will be lost to accommodate Cross Rail 2 but this risk seems to be reducing. The requirement for asset valuations for the Council's annual accounts is expected to be maintained as is the need for an officer to confirm that the council's property transactions achieve best value.</p>	<p>There is no national or regional policy that may be applicable to this service. Covid 19 has had limited impact as the council owns little property that has suffered from the restrictions required to fight the pandemic. Officers are working from home satisfactorily and this is unlikely to change.</p>	<p>Through review of its property assets the service will seek to ensure that the council's commercial estate is performing to its best and maximising the supply of revenue income to the council. Through customer satisfactions surveys we will continue to provide the best quality service. By providing public access to plans of the council's land ownership through Merton Maps and council property that is on the market and information on access to details of private landownership through the land Registry and applications for Assets of Community Value through the Council's website the team contributes to the long term recovery and Modernising Merton Programme.</p>

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Where are we now?

Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Complete Asset Valuations to timetable agreed with Director of Corporate Services.	Annual objective. Objective met. Valuations completed and supplied to Finance by 31st March 2020. Asset Valuations for 31st March 2021 have been completed and supplied to Finance by the agreed date. Work is now progressing for 31 March 2022 Asset valuations.	Carry forward
Implement review of non-operational property to maximise revenue income.	Objective met. Review completed December 2018.	Close
Critically examine operational property to ensure the council has the minimum necessary to support the business plan.	Objective not met as impact of Covid 19 prevented departments confirming their property needs to the Corporate Property Officer by June 2020 as Asset Management Plan requires.	Carry forward
Maximise revenue income by letting vacant property.	Objective met. Vacancy rate 1%.	Carry forward
Provide timely advice to inform regeneration projects.	Objective met. The team continue to provide advice as required.	Carry forward
Ensure team is arranged to support objectives.	Team is now almost totally committed to Asset Valuations. The reduced team is just managing to support objectives however this is not sustainable and additional resource is required to assist with the work of the three retired team members. With the retirement of the Property Management & Review Manager the resource of the section has been further depleted. Whilst the remaining three members of the team are working hard to meet objectives it is not going to be possible to deal with all matters required.	Carry forward

How will we get there?

Try to limit this to no more than around 5-7 key objectives. This section should be reviewed if there are any significant changes in direction during the year. Changes can be noted along with the reasons for and implications of the change. When you review this, look for opportunities, insights, or risks that have emerged.

Service Objective 1 Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions

Maximise occupation of commercial property owned by the council. Continuously improve

Performance Measures

Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% Vacancy rate of property owned by council	1%	Green	3%	3%	3%	3%		Quarterly	Low

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
Project / activity 1			
Project / activity 2			

Potential barriers to achieving objective

Description of barrier	Mitigating Actions
Fall in demand	Maintain condition of estate and wide use clauses in leases
Failure to comply with EPC regulation	Invest to ensure compliance

Impact on the customer/end user

Maximises income and employment.

Partners / interdependencies

Corporate Services/Facilities Management support.

Service Objective 2 Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions

Maximise council income from commercial property Continuously improve

Performance Measures

Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% debt owed to LBM by commercial tenants including businesses	4.18	Green	7.5	7.5	7.5	7.5		Quarterly	Low

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
Project / activity 1			
Project / activity 2			

Potential barriers to achieving objective

Description of barrier	Mitigating Actions
Fall in market	Prompt recovery action

Impact on the customer/end user

Maximised income to the council.

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Partners / interdependencies										
Finance/Debt recovery and SLLP for enforcement and collection.										
Service Objective 3					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Valuation of property assets owned by the council for inclusion within council's accounts					Statutory requirement					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
Property Asset Valuations	325	Green	150	150	150	150		Annually	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Project / activity 1</i>	Instruct DVS to complete specialised valuations						01.10.2021		31.03.2022	
Potential barriers to achieving objective										
<i>Description of barrier</i>						<i>Mitigating Actions</i>				
Loss and/or reduction of staff resource						Exercise, managerial support, mental health support				
Impact on the customer/end user										
Completion of council's annual accounts.										
Partners / interdependencies										
Finance in providing timely and clear instructions.										
Service Objective 4					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Maximise rental income from council owned commercial property					Continuously improve					
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
Number of completed rent reviews	6	Red	70	70	35	35		Quarterly	Low	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Project / activity 1</i>										
<i>Project / activity 2</i>										
Potential barriers to achieving objective										
<i>Description of barrier</i>						<i>Mitigating Actions</i>				
Due to difficulties experienced by tenants caused by Covid-19 Rent reviews have not been actively pursued. Reduced resource of the section has also impacted on the ability to undertake this work.						Reviews will be commenced when the commercial situation improves and resource allows.				
Impact on the customer/end user										
Partners / interdependencies										

Service Objective 5				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions						
Increase receipt of capital				Continuously improve						
Performance Measures										
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity	
n/a										
								Select	Select	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
<i>Project / activity 1</i>	Title reports on each site						01/12/2020		31/03/2022	
<i>Project / activity 2</i>	Confirmation of development opportunity to maximise value on each site						01/12/2020		31/03/2022	
<i>Project / activity 3</i>	Secure marketing resource						01/12/2020		31/03/2022	
Potential barriers to achieving objective										
<i>Description of barrier</i>						<i>Mitigating Actions</i>				
Insufficient resource within property team						Secure additional resource				
Impact on the customer/end user										
Increased capital resource to Council.										
Partners / interdependencies										
Future Merton for planning advice. SLLP for title reports and sale documentation.										

People

The section contains three staff and three unfilled posts. The Interim Section Head/Property Management and Review Manager, one Estates Surveyor and one Administration Assistant. The critical need for the section is to expand the staff resource as at present the work of the section is almost totally dominated by the production of Asset Valuations and the demand for this service is unlikely to reduce. The result is that all of the other responsibilities of this service cannot be delivered to the standard required by London's Best Council and the strategic function of the section and especially the generation of income through rent reviews and lease renewals of commercial property has not been able to be progressed. The attempt by the existing staff to complete all of the demands upon its service has led to increased stress and concern over their wellbeing. In addition, the lack of staff resource has led to the increasing use of consultants that has increased the cost to the council. It is vital that the section is expanded to provide a dedicated valuation/disposal team plus estates team to deal with the very many estates management issues plus lettings, lease renewals and rent reviews. Until such time as the section is expanded with permanent staff it is intended to employ two temporary chartered surveyors on fixed term contracts to deal with the back log of rent reviews and lease renewals.

Technology

Following the pandemic and the implementation of working from home, the section all use Council laptops. The section use and need the following information assets: BCIS online, Tman, E5, Electronic file, IPF data base Merton Maps. The IPF system has been reprocured to expand its use to Finance and Facilities Management. There are no future business needs that require a change in technology although there will be a need for more lap tops if the team is expanded plus Ipads that could be of benefit to any new staff. Scanning the paper records has been completed of old files but it would be helpful if this could be continued to scan data received post 2015 when the previous exercise was carried out and to keep up to date.

Service improvement

The main processes relate to ownership of land, the maintenance of the record of land ownership of the Council, the granting of leases, settlement of rent reviews and the collection of rent and service charges. In addition the team manage applications for the listing of property as community assets and the removal of unauthorised occupations of Council land. The main issue is staff resource not process, although it would be beneficial if E5 could be better directed to rent collection and we did not need to instruct Transactional Services on every property every time rent is due to be collected (quarterly, annually and monthly) and we could interrogate E5 to confirm what had been charged previously. There is no appetite from other authorities to share services and LEAN reviews have confirmed that our processes are operating effectively subject to previous comments. Budgets, invoices checked and reports could identify addresses rather than debtors.

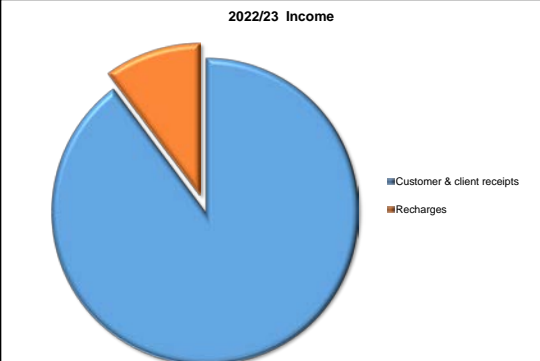
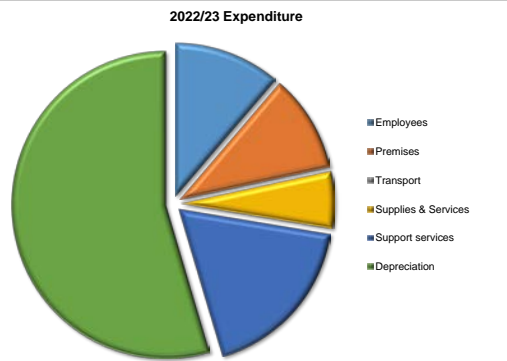
Financial Summary - Property Management & Review

Agreed saving to be introduced from 2022/23 related to increased service tenancy income.

DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	2,374	2,714	2,786	283	2,769	2,777	2,784	2,792
Employees	303	235	312	(111)	312	312	312	312
Premises	276	280	279	232	286	290	293	298
Transport	1		1	(1)	1	1	1	1
Supplies & Services	171	226	174	163	166	169	171	173
3rd party payments	0		0		0	0	0	0
Transfer payments	0		0		0	0	0	0
Support services	452	460	507		491	492	494	495
Depreciation	1,171	1,513	1,513		1,513	1,513	1,513	1,513

Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	5,477	5,786	5,466	(460)	5,552	5,560	5,568	5,576
Government grants	0		0		0	0	0	0
Reimbursements	0	0	0		0	0	0	0
Customer & client receipts	4,961	5,288	4,913	(460)	4,985	4,985	4,985	4,985
Recharges	516	498	553		567	575	583	591
Reserves								
Capital Funded								
Council Funded Net Budget	(3,103)	(3,072)	(2,680)	(177)	(2,783)	(2,784)	(2,784)	(2,784)



Summary of major budget etc. changes

Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Capital Works		2	73	0	35	0	0	0
	0	2	73	0	35	0	0	0

2022/23
ENV2021-07 = (£100k) - Increase residential (former Service tenancies) rental income.

2023/24
ENV2022-23 08 = (£50k) rent income review

2024/25

2025/26

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Service Plan for : Regulatory Services Partnership

Service Manager:	Nick Steevens	Cabinet Member:	
Peer review date:		Name of peer:	
Date created:	Nov-21	Date of next review:	

Overview of the service

Provide a brief overview of your service and the outcomes it seeks to provide for residents/service users, including any statutory duties that impacts on this

The Regulatory Services Partnership (RSP) delivers Environmental Health, Trading Standards and Licensing functions on behalf of Merton, Richmond and Wandsworth Councils. The partnership was established on 1st August 2014 comprising two councils, namely Merton and Richmond upon Thames with Merton acting as the host authority. Wandsworth Borough Council joined the RSP on 1st November 2017. The services the RSP provides include:

- Air quality
- Contaminated land
- Food safety
- Infectious disease control
- Licensing (e.g. alcohol, entertainment, street trading, special treatments and animal welfare)
- Noise & nuisance
- Pest control (Wandsworth only)
- Private sector housing (Wandsworth and Richmond only)
- Trading Standards
- Workplace health & safety
- Pollution

The vision of the Regulatory Services Partnership is to be a beacon of excellence in Regulatory Services, safeguarding our communities and promoting economic wellbeing. The RSP has three key drivers:

1. To deliver improved services to customers
2. To achieve savings targets and to reduce budget pressures
3. To increase resilience

Merton's ambitions

It is important that the activity in your service plan has a clear link to helping achieve the council's overall ambitions. Please consider these ambitions when developing your plan and ensure that activity and projects are matched against them:

- Support our most vulnerable residents of all ages
- Maintain a clean and safe environment
- Create a great place to grow up and live in
- Build resilient communities
- Bridge the gap and reduce inequalities
- Continuously improve

What do we need to do?

In developing your plan it is important to understand the wider context in which the service and the council operates. Please refer to Merton Data as a tool to help you understand the present and future demands on your service and the views and needs of its customers. This should be combined with local intelligence held by your service.

[Merton Data](#)

[The Merton Story](#)

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p>The RSP is a customer facing service and whilst we do not currently actively survey residents, businesses and partners, we are seeking to do so using electronic questionnaires. The service will encourage customers to access our services electronically using a single website to report an issue or apply for a licence. The standalone website proposed for the service will link seamlessly to the websites for Merton, Richmond and Wandsworth to ensure customers have easy access to the services the RSP provides. Web content will be revised to reflect the needs of the customer and avoid unnecessary contact. Equality Impact Assessments (EIA) are considered for new strategies, policies and in the use of enforcement tools. Our key customers are those who live, work or visit Merton, business operators, other council departments, the police and other regulatory agencies and the voluntary and community sector.</p>	<p>Demand for consumer and business advice and support increased during the pandemic has brought. Added to this, the Brexit implications on many businesses including manufacturers, importers and retailers increased demand for the services expertise. The RSP does not expect this increased demand to drop in 2022/23 as businesses will still require advice and support as part of their recovery following the pandemic and to understand the changing post-Brexit legislative landscape. Merton's population is roughly 210,400 and is predicted to grow by about 1750 (0.83%) each year for the next 15 years. Whilst population growth is uncertain, there is the potential for demand on the services offered by the RSP to increase too. The pandemic has had a detrimental impact on businesses within the borough and the RSP is pivotal in supporting business recovery. This impact on the local economy has caused a reduction in income and decreasing levels of compliance as businesses reduce expenditure on staffing and other overheads.</p>	<p>Covid-19 Implications: The RSP was responsible for much of the front-line regulatory work during the pandemic and as restrictions have eased to support to businesses is still in place to assist with economic recovery. The greatest risk to supporting businesses and controlling the pandemic is the removal of COMF grants to local authorities, which will result in a substantial reduction in Covid resources within the RSP. This reduction in Covid resources will result in the RSP not being able to undertake any additional Covid-19 workload such as Case Tracing, business support and much of the increased 'business as usual' demand going unmet. Brexit Implications: Whilst overshadowed by the Covid-19 pandemic, Brexit will continue to impact our businesses for many years. With over 50 separate EU Directives and Regulations governing Food Standards in the UK, supporting businesses through the changing regulatory landscape will bring challenges. In relation to air quality, the requirements imposed in the Environment Act 2021 will need to be adequately resourced to ensure that Merton meets its statutory obligations for the monitoring of air quality and specifically PM2.5s.</p>	<p>The RSP will contribute towards the council's continuous service improvement programme by:</p> <ul style="list-style-type: none"> • Improving access to information for our customers, allowing them to access our services and information they seek with ease and allow them to self-serve wherever possible • Post migration, enhancing the RSP's N.E.C. case management system to permit efficiencies within the service whilst improving responsiveness to customers • Developing uniform, leaner work processes • Introducing mobile working solutions to increase efficiency and reduce paper generation • Develop new commercial business opportunities to generate income and enhance the reputation of the service amongst businesses • Improving customer feedback and intelligence

Where are we now?		
Objectives from the last service plan	Progress made against objectives:	Close / carry forward?
<p>Air Quality - Delivering the Council's Air Quality Objectives.</p>	<p>The Air Quality Team has met its objectives consistently throughout the year including obtaining grant funding for key air quality projects despite the pandemic. The air quality service has:</p> <ul style="list-style-type: none"> • Worked with parking colleagues to link parking policy to Public Health & Air Quality Delivered the London wide NRMM Project • Drafted and deliver the Air Quality Action Plans on behalf of the three boroughs • Supported the implementation of diesel levies for the partner authorities • Managed the impact of the Mortlake Development • Managed the Nine Elms Development Environmental Impacts • Managed the Thames Tideway Environmental Impacts • Sought grant funding for the service to deliver key projects on behalf of the three boroughs. <p>Air Quality objectives expressed in the Air Quality Action Plans span multiple financial years so will need to be carried forward.</p>	Carry Forward
<p>Food & Safety - Delivering the Council's Food Safety, Food Standards and Health & Safety Objectives.</p>	<p>All proactive inspection activity is carried out according to risk-based inspection programmes set by the FSA and HSE which continue year on year. The Food & Safety team's objectives have been largely superseded or suspended by the work undertaken to control the pandemic including outbreak control work, compliance with the Covid-19 Secure guidelines, enforcing lockdown restrictions and supporting businesses with advice through webinars and the Business Champion. Since March 2020 inspection programmes set by the FSA and HSE have been largely curtailed to undertake Covid work. The previous service plan objectives for the Food & Safety service were to:</p> <ul style="list-style-type: none"> • Carry out regular interventions at food businesses at a frequency determined by national risk criteria and local intelligence; • Investigate food poisoning outbreaks associated with food businesses located within the partnership area; • Investigate serious complaints about food purchased from and complaints about hygiene of food premises within the partnership area; • Undertake an annual food sampling programme in liaison with the South West London Food Liaison Group; • Take appropriate and timely action in response to accident (RIDDOR) notifications; • Take appropriate enforcement action for failures to meet legal standards in all areas for which the service is responsible. 	Carry Forward
<p>Licensing - Discharge the Council's legal obligations in relation to licensing.</p>	<p>Licensing performance has been impacted by staff absences and turnover but more significantly by the impact of the pandemic on licensed premises and a substantial increase in complaints and enquiries due to Covid-19. The objectives of the licensing service were to:</p> <ul style="list-style-type: none"> • Process licence applications in accordance with policy, regulations and procedure, undertaking consultation in accordance with legislation and statutory guidance; • Investigate complaints relating to licensing matters, including complaints about adverse health impacts associated with licensed premises; • Carry out targeted enforcement visits based on risk grade of premises or intelligence/ information received; • Review and streamline licensing processes including customer interfaces to increase efficiency and improve customer journey. 	Carry Forward

<p>Noise & Nuisance - Reducing the impact of noise & other nuisances on the public.</p>	<p>Performance of the noise & nuisance service has maintained at a good level despite the substantial increase in workload caused by the pandemic with domestic and commercial nuisance complaints more than doubling across the three boroughs.</p> <ul style="list-style-type: none"> • Investigation of public health nuisance complaints; • Act as statutory consultee for planning and licensing applications; • To investigate complaints related to alleged breaches of the Clean Air Act 1993 for premises in a Smoke Control Area; • Carry out environmental monitoring for noise and air pollutants; • Regulate demolition and construction sites to comply with standards to minimise noise and dust; • To investigate and take action regarding complaints related to defective drainage systems in commercial businesses; • To respond to complaints of rodent infestations in all commercial (non-food) premises. 	Carry Forward
<p>Trading Standards - Protecting the consumer & supporting economic growth through advice to businesses.</p>	<p>Many proactive trading standards activities such as test purchasing has had to stop due to the pandemic. Reactive workload and some proactive projects including Challenge 21 purchasing have continued.</p> <p>The service has redirected resources towards business compliance checks for Covid-19. All test purchase activity will continue next financial year in accordance with the agreed performance indicators. The objectives for the service were to:</p> <ul style="list-style-type: none"> • Investigate referrals from the Citizens Advice Service relating to an alleged breach of criminal fair trading legislation; • Investigate alleged breaches of trading standards legislation; • Carry out intelligence led enforcement visits; • Provide businesses with access to information and compliance advice to help them succeed; • Ensure the safety of consumer products, fair trading and legal measurement of goods through intelligence-led market surveillance and enforcement activities; • Safeguard communities and young people by providing advice and support to business and undertaking test purchasing in respect of age-restricted sales legislation including: alcohol, tobacco, fireworks and knives; • Protect and safeguard consumers, including those that are vulnerable whilst and supporting legitimate businesses by tackling the most serious fraudulent, illegal and unfair trading, including e-crime and scams. 	Carry Forward

How will we get there?

Try to limit this to no more than around 5-7 key objectives. This section should be reviewed if there are any significant changes in direction during the year. Changes can be noted along with the reasons for and implications of the change. When you review this, look for opportunities, insights, or risks that have emerged.

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
Meeting the agreed performance indicators for the RSP. The Regulatory Services partnership has a set of Key Performance Indicators (KPIs) which have been agreed by the RSP Board and respective performance boards for each authority. These KPIs have been designed to track the performance of the service in key areas of business.	Statutory requirement
	Support our most vulnerable residents of all ages
	Create a great place to grow up and live in

Performance Measures

Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% of service requests with an initial response within the 'defined timescale'	90.25%	Green	90%	90%	90%	90%		Quarterly	High
Safeguarding older people - investigate and physical intervention in cases of residents being targeted by financial scams and abuse	Not reported at corporate level	Does Not Apply	Data only	Data only	Data only	Data only		Annually	Select
Safeguarding young people - carry out age restricted sales physical interventions for knives, alcohol, fireworks, tobacco and e-cigarettes	Not reported at corporate level	Does Not Apply	Data only	Data only	Data only	Data only		Annually	Select
High risk A & B and non-compliant C-rated food establishments due for inspection completed	96%	Red	100%	100%	100%	100%		Annually	High
Percentage of alcohol and regulated entertainment licences issued within 10 working days of the conclusion of the 28 day consultation period, excluding those that are subject to a licensing hearing	86.93%	Red	95%	95%	95%	95%		Quarterly	High
Percentage of new high risk massage & special treatment premises inspections carried out within 20 working days of the premises being ready to trade	Not reported at corporate level	Does Not Apply	Data only	Data only	Data only	Data only		Quarterly	Select
Number of monitoring stations achieving the Nitrogen Dioxide air quality objectives	31	Red	50	50	50	50		Quarterly	High
Number of monitoring stations that achieve annual Particulate air quality objectives	1	Green	1	1	1	1		Quarterly	High
Number of Air Quality Audits (using GLA toolkit) of schools prioritising those in the highest pollution areas	Not reported at corporate level	Does Not Apply	Data only	Data only	Data only	Data only		Annually	Select

Air Quality - % compliance of non-road mobile machinery (NRMM) on major construction sites with GLA emissions standards	100%	Green	95%	95%	95%	95%	Annually	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)								
Project / activity name	Description						Proposed start date	Proposed end date
Project / activity 1	Completion of the targets within the services' Air Quality Action Plan							
Project / activity 2	Test purchasing and challenge 21 initiatives						01/04/2021	31/03/2022
Project / activity 3	Completion of the inspection programme for the Food & Safety services and submission of the annual FSA LAEMS return						01/04/2021	31/03/2022
Project / activity 4	Determination of all licensing applications within the statutory timescales						01/04/2021	31/03/2022
Project / activity 5	Inspecting high risk licensed premises (MSTs) within 20 working days on trading						01/04/2021	31/03/2022
Project / activity 6	Completion of the NRMM site inspection programme						01/04/2021	31/03/2022
Potential barriers to achieving objective								
Description of barrier						Mitigating Actions		
Loss of grant funding for air quality projects funded by the Local Implementation Plan (LIP).						The Air Quality Manager has been working closely with TfL and the GLA to ensure that grant funding remains in place for key workstreams within the RSP. Funding has now been agreed for 2021/22 which will permit the project to continue.		
Covid-19.						The pandemic has had a substantial impact on the RSP as the service redirects resources to support the efforts of the council and MOCOG.		
Impact on the customer/end user								
The activities of the RSP ensure the protection of people who live, work and visit the borough from a wide variety of risks.								
Partners / interdependencies								
As a shared service across Merton, Richmond and Wandsworth councils, our customers principally comprise of residents, councillors and businesses. The service also interacts with a number of internal and external stakeholders such as other council departments, central government agencies and other enforcement agencies like the Police, Fire Service, Borders Agency and HM Revenue and Customs. The successful delivery of the RSP KPI's is reliant on sound engagement and partnership working with our partners.								
Service Objective 2						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's		
Continue with the RSP IT Enhancement Project. This project seeks to : <ul style="list-style-type: none"> • Complete the migration of the three IT systems into a single case management system to reduce inconsistencies within the service; • Challenge current ways of working, developing a single, efficient customer focussed process for each activity across the three boroughs; • Transform our services through the use of technology to deliver an improved front line service; • Develop a new website with content focussed on the customers need and encouraging new business; • Work with our partners in ICT, to produce a solution which enables customers to apply and pay for services online; • Introduce mobile working solutions which allow officers to become more agile, receiving requests for service with minimal delay and increasing response and resolution times. 						Continuously improve		
Performance Measures								

Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a								Select	Select
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Project / activity 1	Migration of SSA data onto Merton M3 database. The migration of the data from the Richmond and Wandsworth legacy systems is a complex and protracted process due to the large quantities of data, complexities around code mapping and also the linked documents which required extraction and re-linking						Oct-19	Feb-22	
Project / activity 2	Completion of RSP website and branding. The standalone website and branding for the RSP has been agreed in principle by the RSP Board and is expressed within the services previous TOM document.						Dec-20	Sep-22	
Project / activity 3	Enhanced telephony and mobile working solution. The introduction of a NetCall solution to improve the customer experience when dialling in the RSP is being developed						Mar-20	Complete	
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
The project has been extremely complex with Richmond & Wandsworth (SSA) IT infrastructure and resources (due to Covid-19 demands) being a substantial barrier to the progress of the project .						Weekly liaison meetings with the SSA have been taking place and delays in the project timetable are raised with key stakeholders in the SSA such as the SSA Head of IT, and are reported to the RSP Board routinely. Fortnightly Public Protection IT Priorities & Major Projects Board also ensures that there is proper oversight within Merton.			
Technical challenges in data extraction and code mapping						Liaison with Northgate for ongoing technical support, retention of key members of the project team			
Covid burdens impacting on staffing capacity and focus						Additional staffing resources are being brought in funded by COMF to reduce Covid-19 burden however this funding			
Impact on the customer/end user									
End user experience will be enhanced due to improved service responsiveness, key information and transactional processes all held on a single website. RSP officers will be able to work seamlessly across all 3 boroughs due to single IT platform.									
Partners / interdependencies									
High level of dependency on the SSA (Richmond & Wandsworth) and Northgate (Merton provider).									
Service Objective 3						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's			
Commercialisation: The RSP has a strategy to enhance existing and develop new income streams Working with closely with the Business Improvement Team , we will explore the following commercial opportunities: <ul style="list-style-type: none"> • Developing paid for services that customers want and which enhance their business • Reviewing the fees and charges across the entire RSP to align them as far as practicable • Undertaking work in all service areas on behalf of other local authorities • Increasing the number of Primary Authority Partnerships for the RSP • Selling specialist consultancy skills and expertise to businesses (e.g. acoustic impact surveys; contaminated land expertise) • Selling niche expertise to other local authorities e.g. air quality controls • Developing the ability to provide services nationally through effective use of digital technology 						Continuously improve			

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
n/a									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Development and expansion of the Cleaner Construction/NRMM Project	The NRMM project is a pan-London initiative delivered by Merton. The project can be expanded out as an income generation offer to other cities throughout the UK. To achieve true commercial gain, the resultant NRMM++ would need to sit as a separate commercial entity of Merton Council.						Sep-20	Jul-22	
Alternate Dispute Resolution (ADR)	The RSP could become an ADR provider and offer a dispute resolution service to the public and businesses. The ADR scheme is fully accredited by the Chartered Trading Standards Institute under the Alternative Dispute Resolution for Consumer disputes (Competent Authorities and information) Regulations 2015. It is proposed to develop this work alongside CHAS as a commercial partner.						Jan-22	Apr-22	
Metrology Laboratory	There is currently a laboratory in Wandsworth which is capable of offering metrology services for other authorities as well as the RSP. The intention would be to offer a comparable service to the North East London Metrology Partnership, which is a joint enterprise funded by the Boroughs of Havering, Barking & Dagenham, Redbridge, Waltham Forest and Newham for the provision of Weights and Measures functions under the Weights and Measures Act 1985 in the respective administrative areas.						Apr-22	Aug-22	
Development of web-based training	Whilst face-to-face training opportunities have dwindled, there are opportunities for online training using the RSP website as a sales platform. Working with an existing partner the RSP is looking to rebrand and tailor existing online training packages, reducing the implementation and development costs.						Apr-21	Aug-22	
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
Officer resources - All of the income generation projects require resourcing, wither through the use of existing officer resource or through developing a business case to justify additional funding to pump-prime projects.						Business cases will be developed for those projects where existing resource is insufficient. Specific time allocation will be made for in-house resources in order to deliver marketable products.			
Market contraction- External forces such as a market downturn or local government cutbacks will impact upon income generation.						Difficult to mitigate against external influences however these will be monitored			
Competition - Other local authorities and private sector organisations developing competing offerings may be a substantial risk						The RSP will need to move quickly to ensure that it has developed, marketable offerings quickly.			
Impact on the customer/end user									
None.									
Partners / interdependencies									
Dependency on GLA and commercial partners such as CHAS.									

People

The RSP is committed to recruiting staff with real potential and developing them to excel. A recruitment, development and retention plan has been developed but due to the pandemic has yet to be implemented. A pay & grading benchmarking process with other London boroughs is essential to ensure the retention of staff. If the RSP wants to become a flagship service, it is important to attract outstanding candidates and invest in our existing teams. Regulatory officers within London now command higher salaries than those being offered within the RSP. Development opportunities are now being brought forward through the inclusion of fixed-term development posts in some services and participation in the kickstart scheme.

Technology

Remote working has always been a key aspiration of the RSP and the TOM reflects this as part of the migration & enhancement project. The case based mobile project has been delayed due to the solution not being considered fit for purpose and also due to the need to focus on IT transition. Officers are working with colleagues in IT to establish suitable alternatives. The use of other solutions such as MS Teams, has enabled remote, collaborative working as well as interactive community & business engagement and consultation. The RSP has demonstrated that physical co-location is not essential to deliver its frontline services and in many instances smarter, virtual working has become more productive. Reliable IT infrastructure is essential for the RSP to be able to work and often the IT infrastructure and support is patchy at times and requires investment to ensure it is fit for purpose.

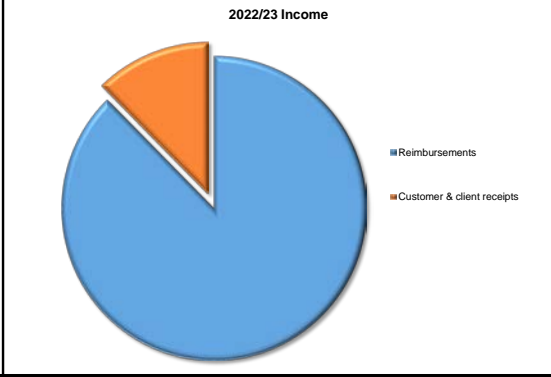
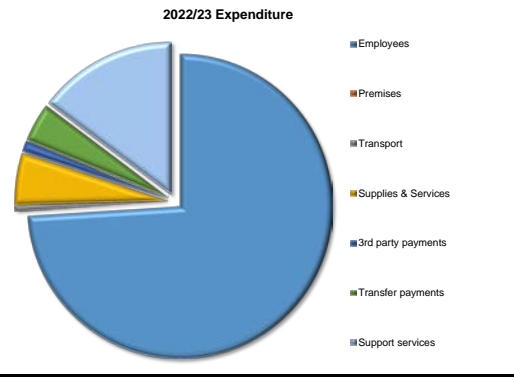
Service improvement

In many areas the RSP still operates differently in each borough. The continuous improvement Team previously assisted in reviews of processes within some service areas to help develop single, efficient ways of working across the three authorities. This work was curtailed due to the pandemic and delays in the IT project. We hope to be able to work with the Continuous improvement team in the future to streamline our processes in all service areas.

Financial Summary - Regulatory Services

The section plans to implement £140k of income generation savings over the next few years, which will be challenging considering the implementation of the current associated savings already built into the MTFS have, to date, not been achieved.

DEPARTMENTAL BUDGET AND RESOURCES								
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	8,122	7,993	8,398	2	8,460	8,470	8,470	8,480
Employees	6,067	5,827	6,204	(49)	6,251	6,252	6,252	6,253
Premises	0	2	0	9	0	-	-	-
Transport	45	48	48	47	49	50	50	50
Supplies & Services	459	368	444	(8)	455	462	462	468
3rd party payments	95	93	96	3	99	100	100	102
Transfer payments	0	0	0	0	347	347	347	347
Support services	1,443	1,641	1,593	0	1,247	1,247	1,247	1,247
Depreciation	13	14	13	0	14	14	14	14
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	6,079	5,510	6,179	221	6,290	6,290	6,290	6,290
Government grants	0	80	0	(8)	0	0	0	0
Reimbursements	5367	5,017	5,467	250	5512	5512	5512	5512
Customer & client receipts	712	413	712	(21)	777	777	777	777
Recharges	0	0	0	0	0	0	0	0
Reserves								
Capital Funded								
Council Funded Net Budget	2,043	2,483	2,219	223	2,171	2,181	2,181	2,191
Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
		0	0	0	0	0	0	0
		0	0	0	0	0	0	0



Summary of major budget etc. changes	
2022/23	E1 = (£65k) - Increased income.
2023/24	E1 = (£75k) - Increased income.
2024/25	
2025/26	

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Service Plan for : Safer Merton

Service Manager: <i>Kiran Vagarwal</i>	Cabinet Member: <i>Cllr Agatha Akyigina</i>
Peer review date: <i>Insert date peer review took place</i>	Name of peer: <i>Insert the name of the peer "buddy" that did the review</i>
Date created: <i>07-Dec-21</i>	Date of next review:

Overview of the service

Provide a brief overview of your service and the outcomes it seeks to provide for residents/service users, including any statutory duties that impacts on this

Safer Merton oversees the delivery of the council's statutory duty set out in the Crime & Disorder Act 1998, specifically Section 17 and Section 115:

- The duty to have in place a Crime & Disorder Reduction Partnership - The Safer & Stronger Executive Board (SSEB), meets quarterly and have in place a local Crime, Disorder & Substance Misuse Strategy.
- Complete an annual strategic crime needs assessment (SCNA) and a bi-annual public consultation to ensure the work of the partnership and the Merton's Community Safety Strategy is informed by local data on crime, anti-social behaviour (ASB), disorder and substance misuse.
- Ensure there is a process for sharing information across the partnership to prevent, detect and deter crime and ASB (Section 115)

The Safer Merton Team provides strategic and operational functions that cut across a number of areas, this includes:

- Responding to complaints of ASB, supporting victims of ASB and taking action against perpetrators, fully utilising the powers afforded to us under the ASB Act 2014.
- Tackling Violence against Women and Girls and Domestic Abuse by commissioning specialist services, leading on the development & delivery of a local strategy, working with partners to support victims and bring perpetrators to justice and conducting the statutory Domestic Homicide Reviews (DHR) when required.
- Contributing towards the council's ambition to build resilient communities through the delivery of Merton's Neighbourhood Watch Programme, leading on the development of Merton's Hate Crime Strategy, supporting the Hate Crime Steering Group and the Safer Neighbourhood Board (SNB).
- Managing the council's 24/7 CCTV service, proactively monitoring static cameras and the deployment of mobile cameras. Remaining compliant at all times with the Surveillance Camera Code of Practice as set out in the UK's Surveillance Camera Commissioner and the Regulatory Investigatory Powers Act (RIPA). Processing data and information sharing requests for recorded images in line with the Freedom of Information Act (FOI) and the process for Subject Access Requests (SAR).
- Producing analytical products and implementing a performance management framework to support the partnership. Producing daily, weekly, quarterly and annual assessments to support an evidence based, targeted approach.

The team also secures and manages external funding, this includes the London Crime Reduction Fund (LCPF), the Violence Reduction Funding (VRF), commissioning services and managing relevant contracts.

The service considers wider local, regional and national strategies and policies relevant to the work of the SSEB, this includes the Mayor's Office for Policing and Crime Plan and Home Office strategies.

Merton's ambitions

It is important that the activity in your service plan has a clear link to helping achieve the council's overall ambitions. Please consider these ambitions when developing your plan and ensure that activity and projects are matched against them:

- Support our most vulnerable residents of all ages
- Maintain a clean and safe environment
- Create a great place to grow up and live in
- Build resilient communities
- Bridge the gap and reduce inequalities
- Continuously improve

What do we need to do?

In developing your plan it is important to understand the wider context in which the service and the council operates. Please refer to Merton Data as a tool to help you understand the present and future demands on your service and the views and needs of its customers. This should be combined with local intelligence held by your service.

[Merton Data](#)

[The Merton Story](#)

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p>Safer Merton follows an evidence based approach to prioritise its services and when proposing strategic priorities for the SSEB.</p> <p>The SSEB receives a quarterly dashboard to measure partnership performance and an annual in-depth strategic crime needs assessment on which to base long term partnership priorities on. Safer Merton also produces specialist insight profiles on the various partnership priorities this includes profiles on domestic</p>	<p>Safer Merton is a service that is open to all and its customer profile is not easily broken down into demographic groupings. Crime and Anti-Social Behaviour (ASB) can happen to anyone: resident, visitor, employee or business and can also have a far-reaching impact</p>	<p>Cases such as the Sarah Everard Case and the Black Lives Matter Campaign have impacted on community confidence in policing and the fear of crime. Multiple protests around climate change & Covid Vaccinations have also placed additional pressures on the police. The re-unification of the Probation Service has taken place with a new operating model now in place.</p> <p>Recent terrorism related incidents have also impacted on</p>	<p>Safer Merton will contribute towards the council's continuous service improvement programme of working to be London's best council & Merton's recovery and modernising programme by:</p> <ul style="list-style-type: none"> * Ensuring a strong, compliant and well-co-ordinated Community Safety Partnership is in place, embedding recognised good practice, supported by a clear governance structure. * Information sharing arrangements are regularly reviewed and

abuse, sexual violence, hate crime, violence, burglary, robbery.
 Bi-annually the team manages the delivery of a borough wide community consultation of crime and ASB as well as considering wider Merton Council and partnership consultation, the results of which further inform the services we deliver and the strategies we develop.
 Our key customers are those who live, work or visit Merton, other council departments, the wider criminal justice partners and the voluntary and community sector.
 Equality Impact Assessments are considered for new strategies, policies and in the use of enforcement tools such as the Public Space Protection Orders.
 Safer Merton also contributes towards other insight and data products across the council and partnership including the Joint Strategic Needs Assessment (JSNA), Cumulative Impact Zones to support licensing ensuring crime and community safety data is integrated and referred to where necessary.

Employer or business and can also have a far reaching impact amongst families and local communities. Being a victim of crime can have lifelong consequences, not only for the victim, but the victim's family and the wider community. Crime is also perceived in different ways by different people and as such, when profiling our victims, we need to consider social and economic influences alongside deprivation and crime levels.
 According to the 2021 Merton Story the resident population of Merton in 2021 is estimated to be 212,88 and is predicted to grow by about 1800 (0.85%) each year for the next 15 years. As the population size increases there is the potential for crime to increase too. Regular reviews of the crime figures will enable us to ensure that the service we provide is fit for purpose and will serve the population of Merton effectively.
 In 2021, an estimated 79,352 people (37%) in Merton are from Black, Asian and Minority Ethnic (BAME) group. The population of minority ethnic groups is projected to grow at a faster rate than White British ethnic groups. The geographic distribution of ethnic groups in Merton is not uniform. A larger proportion of Black and Asian Minority Ethnicity (BAME) groups live in East Merton, while a larger proportion of White ethnic groups live in West Merton We need to ensure that our service is accessible to all, ensuring that translation services are available when required.
 Hate crimes can affect people from different backgrounds and will be a crime flag that we will need to continue to monitor.
 According to ONS, the total number of households in Merton in 2021 is estimated to be 79,099, and ONS predicts that this will grow to 86,473 by 2046. The increase in the number of households could have an impact on domestic related crimes, such as burglaries and domestic violence.
 Social inequalities exist within Merton, according to the Merton Story, East Merton has a high proportion of people from minority ethnic groups, a higher amount of socioeconomic deprivation and a lower average life expectancy.

community concerns. The police monitor community tension and share this centrally, as part of this process Merton Council are provided an opportunity to include community tension that we are aware of for the consideration of the police. This includes issues relating to counter terrorism being picked up within this assessment.
 Regional/National
 *Mayors new crime and policing plan & VAWG Strategy
 *Domestic Abuse Act 2021
 *Serious Violence Reduction Orders & Serious Violence Bill
 *Restructure of the National Probation Service and London CRC
 *Increasing confidence in the police and criminal justice system and addressing inequalities is a key London strategic and policy priority
 *The Youth Violence Commission published its final report, which recognised the devastating effect that serious violence has on young people and emphasised the importance of investing in youth services and early intervention
 *Stop and Search IOPC enquiry recommendations
 * Victims code of practice

in place across the partnership to reduce the barriers to sharing information and increasing the chances to prevent, detect and deter crime and ASB
 *Positive and co-ordinated multi-agency working at both strategic and operational level backed with an approach of effective problem solving, increased community engagement to reducing the impact that crime and ASB have on those who live, work and visit Merton, increasing community confidence in the partnership.
 *Evaluating and self-assessment of our approach and services to ensure compliance, resilience and accessible services, specifically our CCTV service, domestic violence services and the council's approach to address crime and ASB as per Section 17 of the Crime and Disorder Act 1998.
 *Utilise multi-agency IT platforms, specifically ECINS to its full capacity, implementing it across the partnership and the crime areas to manage individuals and locations where there is greater vulnerability and risk of crime and ASB
 *Seizing all opportunities to work across the South West BCU, developing cross borough partnership working, sharing and pooling resources, good practice and further consideration of shared services

Where are we now?

Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Tackling anti-social behaviour (ASB) - supporting victims, enforcing against perpetrators	<p>Safer Merton continue to lead on the co-ordination and delivery of a multi- agency response to ASB including:</p> <ul style="list-style-type: none"> * Delivering a targeted multi-agency response to locations in the borough subjected to persistent ASB. The Locality Board meets every two months and oversees this. The locations that are currently overseen by the Locality Board are Mitcham, Graveney, Wimbledon, Morden Town Centre, and Raynes Park. * Investigating reports received by the council, supporting victims of ASB and conducting multi-agency site visits. * During the 12 months to September 2021 the Safer Merton team received an average of 1485 reports per month a 20% increase compared to a year ago and a 68% increase compared to two years ago. * The Community MARAC meets monthly to discuss high risk and persistent ASB cases. Since April 2021 the Community MARAC has discussed 30 cases. * Working closely with the Rough Sleepers Group to ensure a coordinated response to rough sleeping. * Implementing the Public Space Protection Order, ensuring that the location is monitored and a balanced approach to enforcement and engagement is in place. * Working closely with our partners in public health to address street drinking. Including through the use of the Public Space Protection alongside activity focused on engaging with street drinkers and balanced approach including support, diversion and enforcement. Work is currently underway to identify the individuals involved in persistent and anti-social street drinking as well as the locations and times where anti-social street drinking is taking place most frequently. * Holding multi-agency task and finish groups (TFG) to respond to complex and ongoing cases of ASB. At the time of writing this report Safer Merton have 15 TFG's active. * Key areas coming to note for a range of crime, ASB and contextual safeguarding issues are: a) the corridor from Mitcham Town Centre up London Road and into Streatham Road and b) the Ryders Park area in and around the vicinity of Carter's Estate. 	Carry forward
Tackling domestic violence and abuse - supporting victims and enforcing against perpetrators	<ul style="list-style-type: none"> *Effective management of the VAWG Partnership Board, a sub group of the SSEB leading on delivering this objective across the council and partnership. *Contract management of commissioned Independent Domestic Violence Advocacy (IDVA) Service, extending the current provision for a further two years. *Delivered 16 Days of Activism campaign in November 2020 and 2021 *Domestic abuse One Stop Shop dealt with 213 cases between March 2019 to the end of March 2020 (figure to be updated for 2020/2021) *Produced the domestic violence and sexual violence profile resulting in further recommendations for the partnership on improving our response *Reviewed Merton's Violence against Women and Girls (VAWG) Strategy, extended until March 2021 with a new strategy planned to commence from April 2021. *Submitted several bids which were unfortunately unsuccessful. (insert detail) *Completed one Domestic Violence Homicide Reviews(DHRs), securing Home Office Sign off and progressed second one to final report and submission to the Home Office *Closed 6 brothels and supported 2 the police in two further closures *Domestic Abuse Act: Funding secured for specialist joint safer Merton and Housing post focussing on enabling Merton to meet part 4 accommodation duty of the Act, established a DA ACT task group to oversee Merton's compliance to the Act * DV MARAC: Secured funding from the London Crime Prevention Fund for additional support for the DV MARAC, completed a safer lives peer review of Merton DV MARAC receiving positive feedback and recognised as good practice *Set up an officers task group to focus on the safety of women and girls, drawing out key actions the council can take to improve the safety of W & G in Merton 	Carry forward
Crime and ASB analysis - providing an intelligence led CSP and the annual strategic crime needs assessment alongside tackling youth violence	<p>Analysis on performance and trends produced:</p> <ul style="list-style-type: none"> * Daily then weekly covid intelligence reports. *Monthly crime update for lead members. *Quarterly analysis on performance and trends to Support Locations Board, Hate Crime Group, Neighbourhood Watch. *Strategic Crime Needs Assessment and Partnership Plan for Merton. *Analytical profiles onHate crime, domestic violence, sexual offences. *Support colleagues within the partnership and Local Authority with crime figures and intelligence. *Performance information for Safer Stronger exec board, Partnership plan, Quarterly Service plan Pl's. *Oversee the production of the partnership Information Sharing Protocol. *Involvement in BCU work via TTCG and pan London Analytical Work via Safe Stats and the London Partnership Analyst Group. *Secured GIS access and training 	Carry forward

<p>To Support the Council's ambition to build community resilience by delivering Merton's Neighbourhood Watch Programme, developing and delivering Merton's Hate crime Strategy and supporting Merton Safer Neighbourhood Board(SNB).</p>	<p>* Tackling hate crime agenda and delivering the hate crime strategy: The Hate Crime Strategy Group continues to drive forward Merton's Hate Crime Strategy. Throughout the pandemic there has been clear communication between the group and its members so concerns regarding community tensions can be flagged, likewise for issues arising from Brexit. A 3rd Party Reporting scheme was launched in March 2020, which continues alongside monthly Hate Crime Advice Surgeries. Key avenues for raising awareness and encouraging reporting have continued to be marked virtually, with IDAHOBIT and Hate Crime Awareness Week delivered successfully in conjunction with our partners from the police and community organisations.</p> <p>* Managing and delivering Merton's Neighbourhood Watch programme: Despite the difficulties posed by Covid-19, a MOPAC funded Police Cadets door knocking project has focused on roads in the borough most affected by burglary and knocked on over 900 doors so far to recruit members to NHW, with 15 new watches being set up or refreshed. NHW has obtained funding to continue this work in 2020-21. There has been increased communications with NHW coordinators via email due to the large volume of scams brought about by the pandemic, and an increase in communications from the police. Relationships with the National Neighbourhood Watch Association have been strengthened with greater opportunities for cross-working.</p>	<p>Carry forward</p>
<p>Managing and delivering a 24/7 CCTV service which includes 210 static CCTV cameras and a current deployable set of 13 cameras</p>	<p>The CCTV service operates 24/7 with 7 operators working shifts. From 1st of April 2020 until 30th of November 2020, the operators have logged 8219 incidents, nearly 500 of which were serious enough for the police and/or the insurance companies to request the footage.</p> <p>Our cameras are maintained, in accordance with our maintenance contract, by Tyco. We successfully completed a procurement process for maintenance of CCTV, ANPR and the system upgrade in November 2021, having in place a new 4 year contract starting in December 2021.</p>	<p>Carry forward</p>
<p>Ensuring MOPACs police and crime plan priorities are delivered locally and overseeing the embedding of the police command units merger working to minimise the impact on Merton and our residents.</p>	<p>* Provided ongoing support to the Safer Neighbourhood, including the securing £27,256 from the MOPAC Community Engagement Funding for 2020-21. Commissioning 6 local community based projects which tackle the objectives in the Mayor's Policing and Crime Plan 2017-21.</p> <p>* £383,894 (over 2 years) London Crime Reduction Funding was secured to support the delivery of the DV IDVA service, Victim Care, tackling exploitation, responding to serious youth violence and contributing towards both the children's and the Adults Safe Guarding Boards.</p> <p>*VRU funding secured to support violence reduction work including for focused youth work (St Giles SOS+ scheme) with young people at risk of criminal exploitation in five schools across the borough.</p>	<p>Carry forward</p>
<p>Ensuring that the borough is doing what it can to work in partnership to reduce violence on the borough</p>	<p>*Crime Stoppers Campaign run by Fearless has reached many young people and professionals on the borough via targeted sessions, social media and campaign materials. Ongoing future work with Crime Stoppers is planned.</p> <p>*Successful VRU bids to support a project with St Giles Trust to deliver violence reduction sessions in schools and voluntary sector led Bystander Training</p> <p>*Successful VRU bid to conduct an evaluation of the contextual safeguarding project in the Phipps Bridge Estate</p> <p>*Successful VRU Critical Incident Fund Bid, to purchase a CCTV camera for violence hotspots and to further enhance our Crime Stoppers offer.</p> <p>*Successful transition of the Knife Crime Plan to the borough's Violence Plan</p> <p>*Regular updates and presentation delivered on the violence work</p> <p>*Ongoing work to utilise the ISTV provision of A&E data to better understand our violence hotspots</p> <p>*Violence analysis and performance included in the Strategic Assessment and as part of our performance presentations to the SSEB, Councillor Briefings and the Locations Board</p>	<p>New in-year action to continue into next year</p>

How will we get there?

Try to limit this to no more than around 5-7 key objectives. This section should be reviewed if there are any significant changes in direction during the year. Changes can be noted along with the reasons for and implications of the change. When you review this, look for opportunities, insights, or risks that have emerged.

Service Objective 1 : To deliver on the council's statutory duty as set out in the Crime and Disorder Act. Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions

To ensure compliance with the statutory duty under Section 17 and 115 of the Crime and Disorder Act 1998 by:

- managing the statutory Community Safety Partnership (SSEB), establishing a local crime, disorder and substance misuse strategy
- following an evidence based approach and assessing the performance and impact of the partnership on crime and ASB by producing the annual strategic crime needs assessment (SCNA), quarterly performance and specialist crime and ASB profiles
- conducting the bi-annual public Community Safety Consultation
- implementing a partnership process to share information to prevent, detect and deter crime

Statutory requirement
 Maintain a clean and safe environment
 Create a great place to grow up and live in

Performance Measures

Indicator	2020/ 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25Target	Frequency	Polarity
Ranking as lowest crime borough (TNO)	New for 2022/23	RAG	TBC	TBC	TBC	TBC	Annual	Benchmark
Ranking as safest borough in London (VWI)	New for 2022/23	RAG	TBC	TBC	TBC	TBC	Annual	Low

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
Project / activity 1	Produce the Annual Strategic Crime Needs Assessment 2022/2023	Oct-22	by December 2022
Project / activity 2	Deliver the public Community Safety Consultation - not needed as bi-annual		
Project / activity 3	Annual review Community Safety Strategy for Merton 2022-2025	Jan-23	by 1st April 2023
project/activity 4	Facilitate and manage the Statutory Community Safety Partnership & delivery of the Community Safety Strategic objectives	ongoing	by 30 March 2023
Project / activity 5	Conduct annual review Section 115 Information Sharing agreement		by June 2022

Potential barriers to achieving objective

Description of barrier	Mitigating Actions
Lack of funding to support the delivery of the Community Safety Strategy, for example, reduction/withdrawal of the London Crime Reduction Funding (LCPF), the Violence Reduction Funding.	MOPAC have confirmed that at least 3 years of LCPF funding will be available for the same amounts as 2021/2022 - at the time of writing this plan we are awaiting confirmation- due in November/December this year.
Domestic Violence Act and new duty on the provision of accommodation - impact on colleagues within housing, Children and families and the SSEB partnership working on VAWG	Safer Merton have secured a post funded by MHCLG until September 2022 to focus on part 4 of the DA Act (Housing Duty), working group for the implementation of the DA Act Locally has been established, work plan is in place to ensure Merton is compliant

Impact on the customer/end user

Please highlight the anticipated impact on the customer/end user of carrying out the activity in your service plan
 Merton will have an effective statutory community safety partnership in place that responds to crime and ASB impacting on those who live, work and visit Merton. The partnership will have a clear process in place to share information for the purpose of detecting, preventing and deterring crime and ASB. The partnership will also follow an evidence based approach, agreeing priorities that are responsive to community safety matters that impact on communities within Merton.

Partners / interdependencies								
Highlight any interdependencies where other council services or partner organisations are linked to the delivery of this objective.								
<ul style="list-style-type: none"> - Attendance and participation at the Statutory Safer and Stronger Executive Board (SSEB) - Contribute towards the production of the strategic crime needs assessment by sharing data with Safer Merton - Supporting the public community safety consultation on crime and ASB - to achieve maximum responses - By adhering to the information sharing arrangements in place, actively sharing information and data to detect, deter and prevent crime and ASB 								
Service Objective 2: To ensure our local approach to crime prevention and community safety reflects local, regional and national policy and good practice.				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				
To ensure regional and national strategies and policies, relevant legal requirements and good practice are reflected in our local approach, including the Mayor's Office for Policing and Crime, The Home Office and London Crime Reduction Funding, The Domestic Abuse Law, Mayors VAWG Strategy, Home Office VAWG Strategy.				Continuously improve				
				Statutory requirement				
				Select				
Performance Measures								
Indicator	2020/ 21 Actual	RAG	2020/21 Target	2021/22 Target	2022/23 Target	2023/24 Target	Frequency	Polarity
n/a							Select	Select
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)								
Project / activity name	Description					Proposed start date	Proposed end date	
Project / activity 1	Consider local impact of MOPAC, Home Office, strategies/policies and legislative changes relevant to Community Safety and implement relevant local changes					Jan-21	Mar-23	
Project / activity 2	Secure London Crime Reduction Funding & Violence Reduction Funding and commission relevant services					Jan-21	Mar-23	
Potential barriers to achieving objective								
Description of barrier					Mitigating Actions			
New Crime and Policing Plan for London in place - potential challenge around the London need and priorities balanced with the local Merton Needs					Continued close working and collaboration between the SWBCU and Safer Merton on alignment and at the SSEB.			
Regional, central plans and strategies may not be reflective of or respond to the local prevalence of Crime and ASB issues in Merton					Ensure that the Merton trends in crime and ASB are considered alongside any national, regional policies and strategies ensuring that any such local implementation is relevant to Merton.			
Impact on the customer/end user								
Please highlight the anticipated impact on the customer/end user of carrying out the activity in your service plan								
<ul style="list-style-type: none"> - Community Safety Partnership is better informed of potential future impact and opportunities for the partnership - Merton Safer and Stronger Executive Board and Merton Council delivers on good practice and remains in line with regional and national strategy, policy and legislative requirements, whilst at the same time responding to local need and trend. 								
Partners / interdependencies								
Highlight any interdependencies where other council services or partner organisations are linked to the delivery of this objective.								
<ul style="list-style-type: none"> - Contribution towards the partnership horizon scanning - Taking into account, where required, good practice, legislative requirements, regional and national strategies and policies on community safety 								

Service Objective 3: To develop and implement a partnership approach to responding to Violence against Women and Girls (VAWG).				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
To oversee the delivery of the Violence against Women and Girls strategic priority. Commission and manage services that support victims of domestic violence and abuse. Work with partners to develop an approach to bring perpetrators to justice and implement the statutory process of Domestic Violence Homicide Reviews and other related legislation as and when required.				Support our most vulnerable residents of all ages					
				Statutory requirement					
Performance Measures									
Indicator	2019 / 20 Actual	RAG	2020/21 Target	2021/22 Target		2022/23 Target	2023/24 Target	Frequency	Polarity
Repeat DV MARAC cases by volume	39.75%	Green	30-60%	30-60%	30-60%	30-60%	30-60%	Monthly	Benchmark
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Project / activity 1	Commission and contract management of specialist Domestic Abuse services including, Independent Domestic Violence Advocacy Service (IDVA). Manage the Domestic Violence One Stop Shop held Monthly.						ongoing	Mar-23	
Project / activity 2	Manage the monthly DV MARAC meetings - ensuring a co-ordinated approach to supporting high risk victims.						ongoing	Mar-23	
Project / activity 3	Develop and oversee delivery of a Violence against Women and Girls and Domestic Abuse Strategy for Merton (By April 2022) , supported by an annual delivery plan. Manage and facilitate the multi-agency Violence against Women and Girls (VAWG) Delivery Board (meets quarterly), a sub group of the SSEB. (& Safety of women and girls)						ongoing	Aug-22	
Potential barriers to achieving objective									
Description of barrier						Mitigating Actions			
Lack of funding to commission domestic violence services 2 out of the 3 IDVA's are funding via the LCPF which is only confirmed until March 2022 awaiting 2022 -2023 settlement						Currently this is funded partly by the council and partly by the MOPAC LCPF. LCPF funding is secure until March 2022. Any funding gaps to be highlighted corporately. Commissioned services are already aware of the clause around 'subject to funding'.			
Lack of partnership and wider council input in responding to Violence against Women and Girls						Continued partnership and wider council engagement both strategically and operationally			
Impact on the customer/end user									
Please highlight the anticipated impact on the customer/end user of carrying out the activity in your service plan									
<ul style="list-style-type: none"> - Victims of domestic violence & abuse are able to access specialist support and advise from across the partnership through the IDVA support and the One Stop Shop. - Partners are able to refer cases of high risk cases to the DV MARAC to ensure a more intense multi-agency approach is in place to safeguard the victim and his/her children - SSEB have a co-ordinated approach in place to respond to Violence against Women and Girls through a coherent strategy, delivery plan and quarterly VAWG board meeting 									
Partners / interdependencies									
Highlight any interdependencies where other council services or partner organisations are linked to the delivery of this objective.									
<ul style="list-style-type: none"> - The police, probation, public health, registered social landlords in Merton and CCG's are linked to the delivery of this objective - The council Children, Families and Schools directorate, Housing and Adult Social Care are also linked to the delivery of this objective as it relates to the safeguarding of adults and children 									

Service Objective 4: To respond to complaints of Anti-social Behaviour, utilising all the tools and powers afforded to us under the ASB Act 2014.				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				
<i>To support victims of anti-social behaviour (ASB), take enforcement action against perpetrators and provide a multi-agency response to locations in Merton subjected to persistent ASB and Crime.</i>				Maintain a clean and safe environment				
				Create a great place to grow up and live in				
Performance Measures								
Indicator	2020/2021 Actual	RAG	2021/22Target	2022/23Target	2023/24 Target	2024/25 Target	Frequency	Polarity
Number of interventions using the powers provided under the Anti-social Behaviour, Crime and Policing Act 2014 (CPNW,CPN, Civil Injunction, Closers)	New for 2022-23	Not Yet Known	TBC	TBC	TBC	TBC	Quarterly	Benchmark
ASB cases acknowledged within service timescales	95.33%	Green	90%-100%	90%-100%	90%-100%	90%-100%	Quarterly	Within a range
Projects / key activities to support the objective <i>(provide a brief description of any projects / key pieces of work that will enable you to meet the objective)</i>								
Project / activity name	Description						Proposed start date	Proposed end date
<i>Project / activity 1</i>	Effective use of ASB tools and powers and multi-agency problem solving of ASB cases and developing good local multi-agency practice						<i>ongoing</i>	
<i>Project / activity 2</i>	Focus on locations where there is persistent ASB, implementing effective local multi-agency action plans, monitored via the quarterly Localities Board						<i>ongoing</i>	
<i>Project/activity 3</i>	Implement use of the multi-agency casework platform - Ecins - across the partnership - to respond to cases of ASB (Ecins also supports the other multi-agency panels responding to DV, offender management & rough sleepers - Safer Merton are co-ordinating the implementation of this.						<i>ongoing</i>	<i>Mar-22</i>
<i>Project / activity 4</i>	Direct casework support for victims of ASB (non-clarion tenants) and effective engagement in the Community MARAC (deals with high risk/vulnerability ASB cases)						<i>ongoing</i>	
Potential barriers to achieving objective								
<i>Description of barrier</i>				<i>Mitigating Actions</i>				
<i>Lack of multi-agency working & lack of willingness to access and use Ecins</i>				<i>Agreed multi-agency processes in place and continued development of partnership working and engagement at both strategic and operational level. Ecins Project Board in place to manage the roll out.</i>				
Impact on the customer/end user								
Please highlight the anticipated impact on the customer/end user of carrying out the activity in your service plan								
- Impact on communities and victims of persistent ASB is reduced								
- reduced demand on services across the partnership caused by repeat offending and incidents of ASB								

Highlight any interdependencies where other council services or partner organisations are linked to the delivery of this objective.

- Agency participation in the Community MARAC(ASB) and use of Ecins
- Assistance and support in the problem solving process where wider council service input is required
- Supporting the PSPO's implemented in Merton as required
- Sharing of information in a timely manner
- Signing up to either accessing and/or using Ecins multi-agency case management system used by Safer Merton

Objective 5: To Support the Council's ambition to build community resilience by delivering Merton's Neighbourhood Watch Programme, developing and delivering Merton's Hate crime Strategy and supporting Merton Safer Neighbourhood Board(SNB).

Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions

To Support the Council's ambition to build community resilience by delivering Merton's Neighbourhood Watch Programme, developing and delivering Merton's Hate crime Strategy and supporting Merton Safer Neighbourhood Board(SNB).

- Build resilient communities
- Create a great place to grow up and live in
- Bridge the gap and reduce inequalities

Performance Measures

Indicator	2019 / 20 Actual	RAG	2020/21 Target	2021/22 Target	2022/23 Target	2023/24 Target	Frequency	Polarity
Number of New NHW set up	New for 2022-23	Not Yet Known	10	10	TBC	10	10	Annual Benchmark

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
Project / activity 1	Co-ordinate the Neighbourhood Watch scheme	ongoing	01/03/2023
Project / activity 2	Support the Safer Neighbourhood Board (meetings quarterly) - managing the SNB grant and the commissioning or projects	ongoing	Mar-23
Project / activity 3	Establish and oversee the delivery of the Hate Crime Strategy, the running of the Hate Crime Steering Group (meets quarterly), the hate crime drop in surgeries and the further development of the 3rd party reporting scheme. Have due consideration of the community tensions and increase in hate crime as a result of Brexit and COVID-19.	ongoing	

Potential barriers to achieving objective

Description of barrier	Mitigating Actions
Funding for the SNB ceases - therefore Safer Merton unable to continue to support the SNB as it currently does	Exit plan in place, continued dialogue with MOPAC in relation to the funding
Lack of community participation in Neighbourhood Watch	Continued promotion of the benefits of Neighbourhood Watch in local areas and continued engagement with the members

Impact on the customer/end user

- Please highlight the anticipated impact on the customer/end user of carrying out the activity in your service plan**
- Communities are more engaged and working in partnership with the council and the police to prevent and detect crime
 - Burglary hotspot areas are targeting for increased Neighbourhood Watch Schemes
 - Safer Merton contribute towards the council's ambition to strengthen community resilience
 - victims of hate crime are able to access advise and support from across the partnership

Partners / interdependencies
Highlight any interdependencies where other council services or partner organisations are linked to the delivery of this objective.
 - Partnership engagement in the hate crime steering group and one stop shop
 - police support to respond to hate crime incidents reported and setting up of the Neighbourhood watches

Service Objective 6: To develop a co-ordinated and partnership response to violence. Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions

To develop and co-ordinate the boroughs multi-agency approach to violence reduction. Developing a multi-agency plan, strategic approach, securing funding, commissioning projects and actively contributing towards the South West BCU approach to Violence Reduction.

Maintain a clean and safe environment
 Create a great place to grow up and live in

Performance Measures

Indicator	2020 / 201Actual	RAG	2021/22 Target	2022/223Target	2023/24 Target	2024/25Target	Frequency	Polarity
N/A								

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
Project / activity 1	Update and deliver Merton Violence Reduction Plan	ongoing	ongoing
Project / activity 2	Provide regular updates to the SSEB on the delivery of the Merton Violence Reduction Plan	ongoing	ongoing
Project / activity 3	Actively participate in the SWBCU Violence Steering Group and other partnership forums responding to violence including Youth Crime Justice Board, Integrated Offender Panel, Children and Young Peoples Panel, MARVE	ongoing	ongoing
Project / activity 4	Secure relevant funding (LCPF, VRU) and commission services to support activities in the violence reduction plan	ongoing	ongoing

Potential barriers to achieving objective

Description of barrier	Mitigating Actions
Lack of wider council and partnership support to deliver on the violence reduction plan	Steering group in place to monitor delivery of the plan and provide 6 monthly progress reports to the Safer & Stronger Executive Board

Impact on the customer/end user

Please highlight the anticipated impact on the customer/end user of carrying out the activity in your service plan
 - Multi-agency and public health approach delivered to tackle violence, supporting victims and addressing offending behaviours
 - Increased community engagement, raising awareness and business engagement to prevent and deter violence

Partners / interdependencies

Highlight any interdependencies where other council services or partner organisations are linked to the delivery of this objective.
 - joint working with Children, Schools and Families imperative
 - strong partnership working across the criminal justice agencies and the SSEB members required
 - Teams and agencies delivering on the actions they have committed to as set out in the violence reduction plan
 - participation at the SWBCU Violence Steering Group as and when required
 - information sharing, both slow time and fast time to manage short, medium and long term risk and target resources effectively

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People

1. Ensuring access to training, coaching and mentoring to further develop staff skills in project management, management of grant funding, developing partnership strategies and neighbourhood action plans to respond to crime and ASB.

2. To meet future demand, further developing staff skills to ensure competency in preparing case files for pursuing enforcement action in the courts

1. All Safer Merton staff are able to work from home - as long as they have access to internet and can connect to the council IT, Office 365 and the Ecins case management platform (web based).

2. As a result of smarter working the service is able to increase the use of the existing space by providing a base for the domestic violence IDVA service

3. Staff learning and development plans will consider areas for improving the use of IT platforms such as teams, zoom and other platforms that enable collaborative working, interactive community engagement and consultation

Technology

1. We are involved in the roll out of the new GIS system for the Council and will be accessing the new system as it becomes available. We have already used it to support the PSPO and upgraded the laptops of the analysts to support the software and analytical needs of the service.

2. The OWL messaging service is a platform used for pushing messages out to Neighbourhood Watch and works on the basis of residents signing up to receive community safety messaging. This platform comes at a cost, if the budget was available it would be a good system to secure -however the future of the providers of OWL is dependent on the support they get across London and MOPAC. Currently using excel and emails is causing IT issues and increased officer time to complete the task.

3. The CCTV Capital programme for 2021/2022 and 2022/2023 will require input from IT

4. We require continued use of the ECINS case management platform - Safer Merton have purchased the system which is accessible across the council and partnership for multiple purposes and is value for money - further investment in the additional tools offered with the system would be of benefit for example the automated referral system for case panels such as domestic violence, integrated offender management, rough sleepers - we are not currently using this system to its full capacity.

Service improvement

Using Ecins to its full capacity

We require continued use of the ECINS multi-agency case management platform - Safer Merton have purchased the system which is accessible across the council and partnership for multiple purposes and is value for money, with no additional cost to additional users - further investment in the extra tools offered with the system would be of benefit for example the automated referral system for case panels such as domestic violence, integrated offender management, rough sleepers, or the public facing forms increasing the 'self-service' function - we are not currently using this system to its full capacity.

Strategic Crime Needs Assessment and evidence base to inform local priorities.

Completing an annual strategic crime needs assessment is a statutory duty under the Crime and Disorder Act 1998. Further improvement on the production of this assessment could ensure that wider council data is incorporated into the assessment for example environmental crime (fly-tipping), rough sleeping and wider issues that impact on crime and ASB or areas where the input of the criminal justice agencies (Community Safety Partnership) can assist in the reduction of demand on council services.

Compliance with Section 17 of the Crime and Disorder Act 1998

A council wide section 17 audit could also assist in enabling the partnership but more specifically the council to assess how the council complies with Section 17 of the Act, identifying gaps, good practice.

Compliance with the Surveillance Camera Code of Practice and securing accreditation

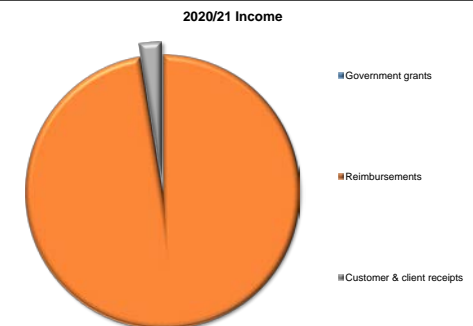
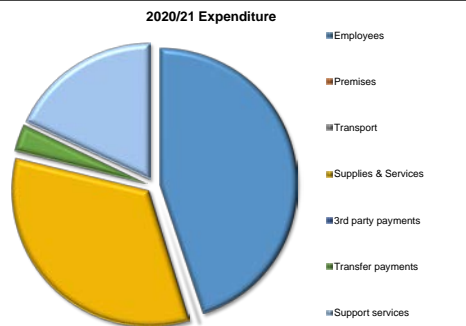
A review/self-assessment on how we use CCTV, body worn cameras (surveillance) across the council and compliance with the Surveillance Camera Commissioners Code of Practice would be of benefit to inform any future improvement plan, reduce the risk of the council being non-compliant. It would also provide reassurance to communities that the public space CCTV is well managed. This review would be for all services using CCTV whether directly by the council or by commissioned services - as the council is ultimately responsible for ensuring compliance of the surveillance camera code of practice. Working towards certification for third parties or for the local authority would be a positive step in this direction.

Financial Summary - Safer Merton

No significant changes currently built into the MTFS.

DEPARTMENTAL BUDGET AND RESOURCES

Revenue £'000s	Final Budget 2019/20	Actual 2019/20	Budget 2020/21	Forecast Variance 2020/21 P7	Budget 2021/22	Budget 2022/23	Budget 2023/24	Budget 2024/25
Expenditure	1,593	1,643	1,540	50	1,833	1,797	1,801	1,806
Employees	789	738	760	(9)	745	745	745	745
Premises	3	12	3	3	3	-37	-37	-37
Transport	1	2	1	0	2	2	2	2
Supplies & Services	296	329	293	56	558	563	567	571
3rd party payments	16	0	0	0	0	0	0	0
Transfer payments	0	0	0	0	53	53	53	53
Support services	325	399	320	0	298	298	298	298
Depreciation	163	163	163	0	173	173	173	173
Revenue £'000s	Final Budget 2019/20	Actual 2019/20	Budget 2020/21	Forecast Variance 2020/21 P7	Budget 2021/22	Budget 2022/23	Budget 2023/24	Budget 2024/25
Income	418	366	204	(27)	208	208	208	208
Government grants	0	31	0	0	0	0	0	0
Reimbursements	418	332	199	(26)	203	203	203	203
Customer & client receipts	0	3	5	(1)	6	6	6	6
Recharges								
Council Funded Net Budget	1,175	1,277	1,336	23	1,624	1,589	1,593	1,598
Capital Budget £'000s	Final Budget 2019/20	Actual 2019/20	Budget 2020/21	Forecast Variance 2020/21 P7	Budget 2021/22	Budget 2022/23	Budget 2023/24	Budget 2024/25
CCTV & Networks		31	197	0	943	724	120	165
	0	31	197	0	943	724	120	165



Summary of major budget etc. changes

2021/22

2022/23

2023/24

2024/25

Service Plan for : Transport

Service Manager:	Charles Baker	Cabinet Member:	Covers a range of portfolio holders
Peer review date:		Name of peer:	
Date created:		Date of next review:	

Overview of the service

Provide a brief overview of your service and the outcomes it seeks to provide for residents/service users, including any statutory duties that impacts on this

Merton Transport Services procure, manage and control the safe management of the council's fleet of vehicles for approximately 26 different internal customers. This includes Parking, Environmental Enforcement, Bailiffs and the Passenger transport fleet. The costs for these vehicles are met via an SLA with each operating unit.

PASSENGER TRANSPORT - Our current key passenger customers are vulnerable adults and special educational needs children. It is important to note that we have no direct contract with the customers as the service is managed and commissioned through C&H and SEN who allocate the work schedules.

The client group is made up of extremely vulnerable children and adults for whom not travelling is not an option. Their abilities and physical challenges mean that in many cases they are unable to make use of conventional transport provision.

In addition to the core services, our Passenger Transport team also provide transport on an ad hoc basis for schools and other establishments, and a self-drive facility for youth services, and other authorised bodies, such as scouts (note that under section 19 regulations, we are unable to extend this service and operate on a commercial basis).

NOTE: Passenger Transport and Fleet services are two separate departments and are not an integrated function.

Merton's ambitions

It is important that the activity in your service plan has a clear link to helping achieve the council's overall ambitions. Please consider these ambitions when developing your plan and ensure that activity and projects are matched against them:

- Support our most vulnerable residents of all ages
- Maintain a clean and safe environment
- Create a great place to grow up and live in
- Build resilient communities
- Bridge the gap and reduce inequalities
- Continuously improve

What do we need to do?

In developing your plan it is important to understand the wider context in which the service and the council operates. Please refer to Merton Data as a tool to help you understand the present and future demands on your service and the views and needs of its customers. This should be combined with local intelligence held by your service.

[Merton Data](#)

[The Merton Story](#)

Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p>Fleet and Passenger Transport is a high performing service with a high level of customer satisfaction (97%).</p>	<p>Current evidence suggest that the number of pupils with Special Educational Needs is also rising, with SEN statements / EHC plans rising by an estimated increase of 127% compared to a general child population increase of around 2%.</p> <p>The SEN Needs Analysis demonstrates that the rate of increase has been greater in recent years and is predicted to continue. This has already resulted in significant pressure on the Transport Service.</p> <p>Against this, it is anticipated by SEN that there will be an increase in the uptake of direct payments by the families of new clients, which will impact on the numbers of clients being provided transport by MTS.</p> <p>This will require greater partnership working with Children's Schools & Families (CSF) and Communities and Housing (C&H).</p>	<p>Following the award of contract to Veolia in April 2017 for the operational management of waste collection and street cleaning, approximately 50% of the council's fleet has been novated to the new contractor along with the workshop facility.</p> <p>As a result of this the service no longer holds a Freight Operator's Licence and the retained Passenger transport service operates under Section 19 permit. It is important to note that this restricts the service from providing additional commercial activities.</p>	<p>Following the award of contract to Veolia in April 2017 for the operational management of waste collection and street cleaning, approximately 50% of the council's fleet has been novated to the new contractor along with the workshop facility.</p> <p>As a result of this the service no longer holds a Freight Operator's Licence and the retained Passenger transport service operates under Section 19 permit. It is important to note that this restricts the service from providing additional commercial activities.</p> <p>Our aim is become London's best Council run passenger transport service. This will be achieved by ensuring we provide a viable, reliable and cost effective alternative to external taxi commissioned journeys on behalf of CSF and C&H. As demand for our service increases we will need to work on strengthening these relationships and look at maximising our shared resource to improve our service offer.</p>

Where are we now?		
Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Undertake a business case to assess the benefits of vehicle route optimisation.	In progress - Soft market testing completed and procurement in progress . Joint project with ICT Business Systems team. Gate way 1 report due Q1 2022.	Carry forward
Undertake a vehicle replacement programme including a review of shared / pool vehicles. This will take into account the findings / recommendations of the parking review.	On hold, awaiting outcome of staff travel review and use of pool vehicles . Infrastructure not in place to support switch to electric vehicles. In agreement with E7R DMT all new vehicles directly purchased for Merton run services will be electric unless an approved Business case signed off BY DMT identifies alternative vehicle choice.	Carry forward
Undertake a joint review of the current service offer provided to SEN and C&H	Completed - Passenger transport operations review undertaken , supported by external consultant EDGE. Recommendations being assessed and key action points to be undertaken in partnership with CSF and C&H.	Close

How will we get there?

Try to limit this to no more than around 5-7 key objectives. This section should be reviewed if there are any significant changes in direction during the year. Changes can be noted along with the reasons for and implications of the change. When you review this, look for opportunities, insights, or risks that have emerged.

Service Objective 1	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
Ensure service performance indicators are monitored, reviewed and delivered within Budget and agreed time frame.	Continuously improve
	Create a great place to grow up and live in

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% Client User Satisfaction	89%	Red	97%	97%	97%	97%		Annually	High
Average % passenger vehicles in use	100%	Green	85%	85%	85%	85%		Annually	High
% in-house journey that meet timescales	100%	Green	85%	85%	85%	85%		Annually	High
Sickness - average days per FTE	26.85	Red	9	9	9	9		Monthly	Low

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
Project / activity 1	Vehicle utilisation (Passenger Transport Fleet) to assess level of occupancy and spare capacity in the service per route.	Jan-21	Apr-22
Project / activity 2	Procure new route optimisation software.	Oct-20	Apr-22

Potential barriers to achieving objective	
<i>Description of barrier</i>	<i>Mitigating Actions</i>
None identified.	
Impact on the customer/end user	
Revised SLA with our customers increasing journey times to and from SEND schools.	
Partners / interdependencies	

Service Objective 2	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
Monitor advancement in alternative fuel technologies and ensure vehicle replacement programme recognises the Councils desire for a full electric Fleet by 2030.	Continuously improve
	Maintain a clean and safe environment

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity

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% of council fleet using Diesel fuel	82%	Green	Target to be agreed subject to financial investment					Annually	High
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description					Proposed start date		Proposed end date	
<i>Project / activity 1</i>	Assess the viability of lease hire arrangements which supplier responsible for upgrading new fleet with most financially practical fuel source as advancement in technology improve and reduce in cost.					<i>Jun-21</i>		<i>Apr-22</i>	
<i>Project / activity 2</i>	Capital programme for depot / Car park refurbishment to upgrade new charging points.					<i>Sep-21</i>		<i>Apr-22</i>	
Potential barriers to achieving objective									
<i>Description of barrier</i>					<i>Mitigating Actions</i>				
Financial - Current estimate cost of in excess of £3m for Garth Rd substation.					Review approach on how we prioritise our carbon agenda and allow for net carbon solutions to be awarded as part of new procurement strategy.				
Impact on the customer/end user									
This should have minimal impact on the customer in terms of service use, but will have long term benefits on air quality in the Borough.									
Partners / interdependencies									

People

The Public Space Division is undergoing a transformational change across all areas and will be underpinned by a divisional restructure.

The focus of the restructure is to ensure that we build greater resilience in the service along with identifying any skills gap which may be identified and relevant training and development support provided to staff and Teams where appropriate.

The review of the structure will bring together, under one central management function, both Fleet Services and Passenger Transport and in doing so supports any future proofing of the service as its work streams are aligned with the needs of SEND and C&H. Our staff are our greatest asset and will need to adapt and grow to new ways of working.

Technology

The IT and Business Improvement Team will play a major role in working with the suppliers to ensure the IT element of the Transport Logistic & Fleet Maintenance systems are installed to enable us to utilise the technology elements of the systems (TRACKING).

Work is already in progress in ensuring that the service has a fit for purpose routing system. The current Corporate IT offer is fit for purpose and meets the core needs of the management function of the service. Moving forward, access to Google Docs will be required as the service looks to integrate its direct reporting functionality with our workshop service providers IT systems.

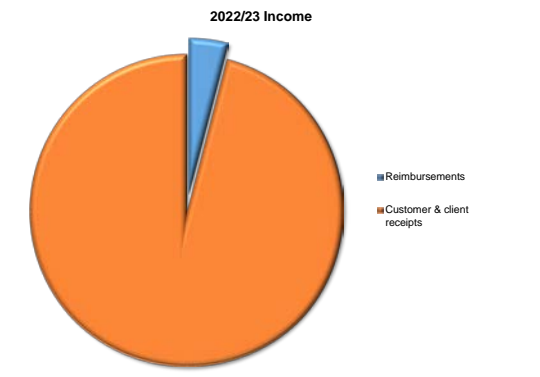
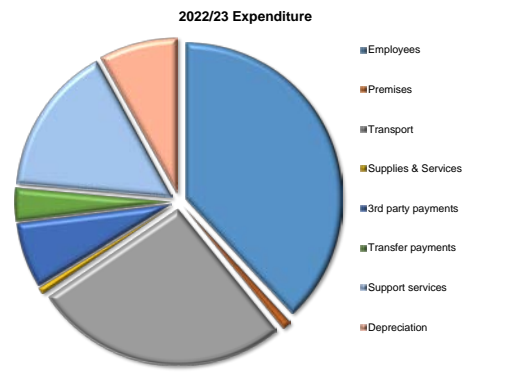
Service improvement

Following the external review of our Passenger Transport Operations there are identified opportunities to integrate our service function further with SEND and C&H by the creation of an Integrated Travel Unit (ITU) which would give overall responsibility for all activities from 'assessments through to operational delivery under one team. The aim would be to create clear and overall accountability for all travel cost in terms of effect assessments and value for money delivery.

Financial summary - Transport Services

No significant changes currently built into the MTFS.

DEPARTMENTAL BUDGET AND RESOURCES								
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Expenditure	3,929	3,466	3,818	(232)	3,856	3,866	3,884	3,903
Employees	1,579	1,317	1,476	(149)	1,471	1,471	1,471	1,471
Premises	33	31	36	0	37	38	38	39
Transport	1,013	769	975	(33)	1,019	1,024	1,037	1,052
Supplies & Services	30	40	29	(1)	28	28	28	29
3rd party payments	260	194	262	(49)	261	265	269	272
Transfer payments	0		0		131	131	131	131
Support services	704	804	729		598	598	598	598
Depreciation	310	311	311	0	311	311	311	311
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Income	3,929	3,526	3,818	161	3,823	3,823	3,823	3,823
Government grants	0		0		0	0	0	0
Reimbursements	158	3,397	158	175	156	156	156	156
Customer & client receipts	3,771	129	3,660	(14)	3,667	3,667	3,667	3,667
Recharges								
Reserves								
Capital Funded								
Council Funded Net Budget	0	(60)	0	(71)	33	43	61	80
Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26
Fleet Vehicles		0	673	0	551	300	0	1,212
Alleviating		1	24	(6)	24	24	24	24
	0	1	697	(6)	575	324	24	1,236



Summary of major budget etc. changes

2022/23
2023/24
2024/25
2025/26

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Service Plan for : Waste Management & Cleansing

Service Manager:	Charles Baker	Cabinet Member:	Councillor Natasha Irons
Peer review date:		Name of peer:	
Date created:	05/11/2021	Date of next review:	

Overview of the service

Provide a brief overview of your service and the outcomes it seeks to provide for residents/service users, including any statutory duties that impacts on this

The London Borough of Merton is a Principal Litter Authority with a statutory duty under the provisions of the Environmental Protection Act 1990 to ensure that 'relevant land in its area is, so far as is practicable, kept clear of litter and refuse.'

The Council also has a statutory duty under the Environmental Protection Act 1990 to collect household waste and a Duty of Care to handle waste responsibly but they also have a range of other responsibilities which specifically relate to municipal waste.

One of the key pieces of legislation is the Waste Framework Directive 2008 which sets the basic concepts and definitions related to waste management, such as definitions of waste and recycling and a legally-binding five step waste hierarchy.

The Waste Framework directive also requires councils to provide separate collection of paper, plastics, metal and glass. In England, separate collections are required where they are technically, environmentally and economically practicable (TEEP) and appropriate to meet the necessary quality standards for the relevant recycling sectors.

The Waste Services Team have undergone a significant level of change in recent years. We have moved away from providing these services in-house and now focus on the commissioning and contract management / facilitating of the services which we provide for our customers.

Our aim is to ensure that Merton is a great, sustainable place to live with clean streets and an efficient waste collection service supported by sustainable waste disposal arrangements. This is achieved by fulfilling the Council's statutory responsibility in respect to waste collection, street cleansing and the associated disposal of all waste streams.

We are working towards improving our customer experience in reporting of service requests online and via the promotion of mobile applications. The recent dynamic change in how people work and the increase in home working has put an increased demand particularly on the waste collection service and there is an associated increase in domestic waste and recycling production.

The service will have to adapt to keep pace with changing demands and pressures and in particular to meet the demand and Corporate targets to maintain and increase recycling rates and work toward developing opportunities to improve these outcomes.

Merton's Ambitions

It is important that the activity in your service plan has a clear link to helping achieve the council's overall ambitions. Please consider these ambitions when developing your plan and ensure that activity and projects are matched against them:

- Maximising efficiencies through co-ordinated partnership working
- Ensuring services represent value for money and meet the needs of residents and businesses
- Holding those to account who choose to dispose of their waste and litter irresponsibly
- Look for areas of commercial opportunity.
- Create a great place to grow up and live in
- Build resilient communities
- Bridge the gap and reduce inequalities
- Continuously improve

What do we need to do?

In developing your plan it is important to understand the wider context in which the service and the council operates. Please refer to Merton Data as a tool to help you understand the present and future demands on your service and the views and needs of its customers. This should be combined with local intelligence held by your service.

[Merton Data](#)

[The Merton Story](#)

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Customer Insight	Data and intelligence	National / Regional policy implications	Working to be London's Best Council
<p>The new waste collection service which was introduced in Oct 2018 impacted on every household in the borough and was one of the biggest changes in waste collection our residents have experienced in recent history with approximately 74% of households experiencing a change in the day of collection.</p> <p>There are currently c 68,000 kerbside properties which receive the new waste collection service resulting in an average of 680,000 collections per month (excluding garden waste). In addition to this there are c 16,000 flats, each receiving a weekly communal collection amounting to 128,000 collections per month.</p> <p>The Service works with the Planning Team to issue a growing number of Houses of Multiple Occupancy (HMOs) with Waste Certificates and ensure that suitable waste collection arrangements are in place to cope with the additional waste that arises from such housing arrangements.</p>	<p>Merton has a population of 211,787. By 2030 the population is predicted to be 224,502 (source: https://data.merton.gov.uk/population/). To meet this growth the service is expecting an additional 1,328 new homes to be built each year. We anticipate that the majority of new homes built will be flats or houses of multiple occupancy and serviced by communal collections. These properties are historically challenging to manage in regards to resident engagement and participation in our recycling services.</p> <p>The predicted increased population and anticipated increased number of communal collections will put considerable pressure the borough's waste collection service and additional financial pressure associated with the additional cost of disposal for which we have a statutory duty to provide.</p> <p>The street cleansing service needs to maintain all public roads of which there are 1,482 including the Public Rights of Way (PROW) to the required standard. The Neighbourhood Team work to a Target Operating Model to ensure that each street is inspected a minimum of once a month. This information is reported in a weekly dashboard and monthly report and is utilised by the Client Team to discuss with Service Providers and utilise the intelligence to ensure that resource is targeted to the areas that require it the</p>	<p>The Authority has a legal duty under the Environmental Protection act 1990 to collect household waste and keep our land free of refuse and litter including fly tipped material from public land.</p> <p>The Waste (England and Wales) Regulations 2011 (as amended 2012) are designed to implement the requirements of the EU Waste Framework Directive; Article 4 applies to the handling and processing of certain recyclable materials. The essence of the Directive is to ensure that materials collected as recyclables, are indeed recycled, and do not find their way into landfill or are disposed of in another way.</p> <p>The Directive and the Regulations which translate that into law have therefore introduced what is known as TEEP. "Technically, Environmentally and Economically Practicable"</p> <p>In forming a judgement about the type of collection methodology that should be used, a TEEP analysis has been undertaken to demonstrate whether it is necessary to implement any changes to the collection arrangements to ensure the authority complies with the new directive.</p> <p>As part of the Mayor of London's Environment Strategy, all London authorities have been tasked with completing a Reduction and Recycling Plan</p>	<p>With the growing financial pressures placed on Local Authorities the one thing that will remain constant will be the need to change. We will need to look across all services and identify new initiative ways of working and redesign services with the residents at the heart of the design process.</p> <p>This can be achieved through our vision and values. We will build, with our residents and partners, a sustainable community; dynamically positioning the directorate within the different communities to understand their needs and support them from an informed position. A greater sense of inclusiveness and belonging, building a larger cohort of engaged employees and residents.</p> <p>Engaging and energising local communities will be indispensable when it comes to developing a sense of ownership in local decision-making and service delivery. Standards will be maintained / improved through peer pressure and engagement from residents rather than through micro management of functions provide by the authority.</p> <p>In order to achieve our vision, our relationship with our residents and partners will be tested. We currently operate within a parent / child relationship with our residents in which the authority takes the lead role in providing all required services. Moving forward this relationship will change. Residents engage with what they feel part of and value what they help to build.</p> <p>We have a proven track record of implementing change at a strategic level and at a structural level (organisational) including process/ operational</p>

<p>most.</p>	<p>(RRP) covering the period April 2018 – March 2022 which sets out how the councils aims in achieving the Mayors recycling target. (50%) The supporting strategy sets out objectives, targets and policies for the effective management of London’s municipal waste and to accelerate the transition to a circular economy.</p> <p>In line with this requirement we have produced a Reduce and Recycling Plan (RRP) for Merton which illustrates our reduction and recycling targets that contribute to the Mayor’s London-wide targets. This was approved by the Mayor in March this year.</p> <p>The service has worked to produce a business continuity plan and business recovery plan particularly in light of the Covid-19 pandemic. The Service continues to keep up-to-date with Government Guidance and regulation and ensure compliance.</p>	<p>change. The challenge now for the team will be to understand the impact at a cultural level (personal change) we have historically focused on supporting individuals through the change process and outplacement support when people have been required to leave the organisation. Moving forward we all have choices and those that elect to be part of this journey need to understand the challenges that we face and the high expectations required at both a team and individual level.</p> <p>As the directorate continues to shrink our human resource become a high valuable asset to manage. We will need to move away from a command and control style of management and structure, moving towards a transformational style of leadership that empowers proactive teams.</p>
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Where are we now?		
Objectives from the last service plan refresh:	Progress made against objectives:	Close / carry forward?
Undertake a review of current disposal arrangements and develop a new commissioning and procurement plan for each of the waste streams in partnership with the South London Waste Partnership (SLWP).	<p>Refuse - Completed. 25 year contract with Viridor for EFW facility in Beddington.</p> <p>Recycling - Completed. From 2022 this becomes the responsibility of our waste collections provider. To be reviewed in 2022 as part of procurement approach to waste collection contract which expires in 2025.</p> <p>Food and Garden waste - Completed 2021 approved by Cabinet in Oct 2021.</p>	Close
Following the implementation of the new waste collection service and introduction of a new containers recycling, undertake a review of the Neighbourhood Recycling sites to ensure that they continue to provide a valued service and meet the needs of our customers.	Completed.	Close
Undertake a commissioning review of the external enforcement arrangements (make or buy review) taking into account the wider scope of shared enforcement activities.	<p>Soft market questionnaire completed and findings documented.</p> <p>Internal stakeholder engagement completed and scoping requirements have been shared across all departments OPG.</p> <p>Procurement - Project team established and tender documents being finalised.</p>	Carry forward

<p>Public Space Improvement Programme -LOCALISED IMPROVEMENT PLAN</p> <p>Implementation of a depot in the East of the Borough to support the efficiencies within the street cleansing service.</p>	<p>Strategic SCIL bid for Capital Improvements has been approved subject to further revenue clarifications and lease agreements.</p>	<p>Carry forward</p>
<p>Cleaner Merton Programme</p>	<p>Operational and Strategic Programme Board has been established to monitor individual projects which directly deliver improvements to the Public Realm</p>	<p>Carry forward</p>
<p>In field mobile reporting - improved customer contact</p>	<p>Society Works have been appointed for the implementation of new reporting tool Fix My Street. scheduled to go live 2021/22</p>	<p>Carry forward</p>

How will we get there?

Try to limit this to no more than around 5-7 key objectives. This section should be reviewed if there are any significant changes in direction during the year. Changes can be noted along with the reasons for and implications of the change. When you review this, look for opportunities, insights, or risks that have emerged.

Service Objective 1 STREETS	Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions
To ensure that within the agreed financial envelope the key performance indicators are monitored and delivered in line with the assigned frequency.	Maintain a clean and safe environment
	Create a great place to grow up and live in
	Continuously improve

Performance Measures									
Indicator	2020 / 21 Actual	RAG	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	2025/26 Target	Frequency	Polarity
% of sites surveyed on local street inspections for litter that meet the required standard (Monthly) and quarterly in line with NI195 reporting	87%	Green	87%	87%	87%	87%		Monthly	High
% of street cleansing reports rectified within the contract standard time frame	97.92%	Green	90%	90%	90%	90%		Monthly	High
% of Sites surveyed that meet the required standard for weeds	93.13%	Green	90%	90%	90%	90%		Quarterly	High
% of Sites surveyed that meet the required standard for detritus	81.25%	Green	80%	80%	80%	80%		Quarterly	High
% of Sites surveyed that meet the required standard for graffiti	93.25%	Red	95%	95%	95%	95%		Quarterly	High
% of Sites surveyed that meet the required standard for flyposting	99.12%	Green	97%	97%	97%	97%		Quarterly	High
% residents satisfied with street cleanliness	No Residents Survey in 2020-21	Does Not Apply	57%	57%	57%	57%		Biennially	High
% of fly tips removed within 24 hours	89.92%	Red	95%	95%	95%	95%		Monthly	High
No. of fly tips in streets and parks recorded by Contractor	15,857	Red	12,900	18,000	17,500	17,000		Monthly	Low

Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)

Project / activity name	Description	Proposed start date	Proposed end date
Fly Tipping Action Plan	The action plan is a live document which provides the project team with the agreed work schedule design to address the growing demand on our services through the increased level of fly tips as highlighted within the services Fly tipping strategy	Ongoing	Ongoing
Flats Above Shops Project	Key work stream project governed by the Cleaner Merton Programme	Aug-20	Mar-22

Environmental Enforcement - Commissioning	Re procurement activity for external provider to provide greater resilience in addressing areas of environmental crime such as littering						Sep-20	Mar-22	
Potential barriers to achieving objective									
Description of barrier				Mitigating Actions					
Resident Behaviour (Social and Economic) - areas of high deprivation links to increase levels of abandoned waste				The launch of our Fly Tipping Strategy					
Reputational - Third party providers seen as a cash cow and residents fail to acknowledge their role in disposing of their waste correctly				New service provider will require to deliver on areas of corporate and social responsibility . To under pin this any new contract will NOT incentivise the issuing of FPNs through a bonus scheme based on volumes .					
Impact on the customer/end user									
<i>Please highlight the anticipated impact on the customer/end user of carrying out the activity in your service plan.</i>									
Partners / interdependencies									
Cross divisional work streams including Safer Merton , external agencies (Police) and service providers (Veolia).									
Service Objective 2 WASTE				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
To ensure that within the agreed financial envelope the key performance indicators are monitored and delivered in line with the assigned frequency.				Create a great place to grow up and live in					
				Maintain a clean and safe environment					
				Continuously improve					
Performance Measures									
Indicator	2019 / 20 Actual	RAG	2020/21 Target	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	Frequency	Polarity
No. of refuse collections including recycling and kitchen waste (excluding Garden Waste) missed per 100,000	78.08	Red	65	65	65	65		Monthly	Low
Resident satisfaction with the Household Re-use and recycling facility (Garth Road)	No residents survey in 2020-21	Does Not Apply	75	75	75	75		Annually	High
% of Residents satisfied with refuse collection	No Residents Survey in 2020-21	Does Not Apply	73	75	75	75		Biennially	High
% of Household waste recycled and composted	40.33	Red	45%	50%	41%	45%		Monthly	High
Residual waste kg per household	539.89	Red	475	475	475	475		Quarterly	Low
% Municipal solid waste sent to landfill (waste management and commercial waste)	4%	Green	6%	6%	6%	6%		Quarterly	Low

% residents satisfied with recycling facilities	No Residents Survey in 2020-21	Does Not Apply	72%	75%	75%	75%		Annually	High	
Total waste arising per household (KGs)	905.02	Green	910	910	910	910		Quarterly	Low	
% FPNs issued that have been paid	68.01%	Red	70%	70%	70%	70%		Monthly	High	
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name	Description						Proposed start date		Proposed end date	
Side Waste Minimisation Project	Focused engagement with residents who over produce general waste with low levels of recycling. Joint work stream with service provider in the Tagging of bins for repeat offenders.						Mar-21		On Going	
Implement Neighbourhood Approach to Contract Monitoring	The Borough has been divided into 3 operational Neighbourhood, East , west and Central . Each neighbourhood has an associated team of Veolia operatives and an Environmental Manager overseeing and co-ordinating their work. This approach contributes towards building knowledge and a sense of pride amongst the neighbourhood team. The Environmental Managers become familiar with the requirements of the area and apply their resources accordingly.						Mar-21		On Going	
Communication and engagement strategy	Work stream project which underpins the Cleaner Merton Programme of projects - Ensure an always on approach to communication and provide regular progress update to the Joint Waste Committee and relevant stakeholders.						Apr-19		On Going	
Potential barriers to achieving objective										
Description of barrier						Mitigating Actions				
Financial (Revenue) - Funding for projects and communication campaign.										
Impact on the customer/end user										
Increase resident satisfaction.										
Partners / interdependencies										
Highlight any interdependencies where other council services or partner organisations are linked to the delivery of this objective. If referring to another council service, please include the name of the team and department.										
Service Objective 3 - Public Space Project Governance						Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions				
Implement the Cleaner Merton Programme Board , and ensure all identified projects are resourced and deliver a notable and sustainable improvement for our residents.						Create a great place to grow up and live in				
						Maintain a clean and safe environment				
						Continuously improve				
Performance Measures										
Indicator	2019 / 20 Actual	RAG	2020/21 Target	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	Frequency	Polarity	
n/a										
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										

Project / activity name		Description					Proposed start date		Proposed end date	
See individual work stream										
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
Impact on the customer/end user										
Partners / interdependencies										
Service Objective 4 Disposal										
					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Undertake a review of our waste disposal arrangements and ensure suitable outlets are secured for each of the key waste streams collected.					Maintain a clean and safe environment					
					Statutory requirement					
Performance Measures										
Indicator	2019 / 20 Actual	RAG	2020/21 Target	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	Frequency	Polarity	
n/a										
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)										
Project / activity name		Description					Proposed start date		Proposed end date	
Commissioning and tender exercise for Food and Garden waste		Partnership procurement for disposal processing facility to manage our food and garden waste including all bulking and haulage requirements.								
Potential barriers to achieving objective										
<i>Description of barrier</i>					<i>Mitigating Actions</i>					
No Local facility within Partnership boundary large enough to manage total volume of waste.					Procurement - LOTTING strategy designed to encourage both local and international bidders designed to encourage in boundary suppliers and minimise haulage / transfer arrangements for out of borough providers.					
Impact on the customer/end user										
Partners / interdependencies										
Service Objective 5 ENFORCEMENT										
					Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Ensure the new environmental enforcement services is fully implemented and supported by robust contract management procedures including deployment plans and tasking orders.					Create a great place to grow up and live in					
					Maintain a clean and safe environment					
					Build resilient communities					
Performance Measures										

Indicator	2019 / 20 Actual	RAG	2020/21 Target	2021/22 Target	2022/23 Target	2023/24 Target	2024/25 Target	Frequency	Polarity
n/a									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Stakeholder Engagement	Consultation						Oct-20	Nov-20	
OJEU Published	Procurement						Jan-21	Apr-21	
Contract award	Procurement						Apr-21	Apr-21	
Potential barriers to achieving objective									
Description of barrier					Mitigating Actions				
None identified									
Impact on the customer/end user									
Partners / interdependencies									
Commercial and Legal services.									
Service Objective 6				Corporate Ambition link (select from drop down) - each objective should contribute to at least one of the council's corporate ambitions					
Waste and Street Cleansing Contractual Review (Phase C)				Continuously improve Maintain a clean and safe environment					
Performance Measures									
Indicator	2019 / 20 Actual	RAG	2020/21	2021/22	2022/23	2023/24	2024/25	Frequency	Polarity
n/a									
Projects / key activities to support the objective (provide a brief description of any projects / key pieces of work that will enable you to meet the objective)									
Project / activity name	Description						Proposed start date	Proposed end date	
Invitation to undertake dialogue with current service provider							Sep-21	Ongoing	
Cabinet Approval - Recommendation / enforcement							Sep-21	Q2 2021	
Potential barriers to achieving objective									
Description of barrier					Mitigating Actions				
Impact on the customer/end user									
Partners / interdependencies									

People

The Public Space Division is undergoing a transformational change across all areas and will be underpinned by a divisional restructure. Our staff are our greatest asset and will need to adapt and grow to new ways of working.

The focus of this is to ensure that we build greater resilience and flexibility in the service, along with identifying any skills gaps which may be identified and relevant training and development support provided to staff and Teams where appropriate. Both in house (where possible) and external training accessed (where required).

Technology

The current IT systems are designed to support office based staff and are not suited to work undertaken in the field. Our current reporting mechanisms are not user friendly and do not encourage our residents to report service issues on line. This results in a high-level of transactions being undertaken manually and many service users emailing team members directly.

The service is currently looking at existing mobile applications deployed by neighbouring councils, which will enable both residents and client officer to log service requests in real time support by GPS location pins to identify the exact location of the service request. In addition to this functionality any new application will be required to integrate directly with our own CRM system along with providing the management team with service reports, heat maps and response time summaries.

It is highly likely that working from home will become a much larger feature of working for London Borough of Merton. While much has been done to ensure IT accessibility for staff, if members of the Waste Team are to continue to work remotely, it is likely that additional IT equipment such as additional screens and lap top stands / docking stations will be required to ensure the health and wellbeing of staff working from home.

Training on the full capabilities of the current systems and any new systems will be required to ensure the efficacy of the Team.

Service improvement

The restructure will provide a business and development function which will aid in customer service, reporting, documenting and project management functions which will increase efficiency and efficacy of the service.

A new operating model and reporting for contract monitoring inspections has already been positively received and there is scope to increase this across additional elements of the contract.

The Cleaner Merton Programme will become the overarching mechanism for the delivery of service improvement projects, with a Strategic Board and project sponsors to increase transparency and accountability.

Financial summary - Waste Services

The section is currently experiencing a budget pressure in relation to the street cleaning and waste collection contract due to recharges for additional services being undertaken by the service provider. The contractual Annual Review process also has the potential to create future budget pressures. A budget pressure in relation to the Household, Reuse, Recycling Centre (HRRC) site also exists, not least as a result of extending the current contract, via a contract variation, in order to both minimise future costs and to align the contract period with the other SLWP boroughs.

Covid-19 has led to increased disposal costs as more residents work from home resulting in a £250k growth in next year's budget.

A MTFS is to be implemented in 2021/22 relating to zero tolerance approach to littering and environmental offences.

DEPARTMENTAL BUDGET AND RESOURCES									Additional Expenditure Information
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26	
Expenditure	19,000	26,540	19,416	670	19,674	19,927	20,150	20,402	2022/23 Internal Debt Charge = £9k.
Employees	804	674	831	(117)	717	718	718	718	
Premises	11	18	11	5	12	12	12	12	2023/24 Internal Debt Charge = £9k.
Transport	203	97	92	13	26	27	27	27	
Supplies & Services	16,436	23,986	16,731	759	17,164	17,413	17,633	17,882	
3rd party payments	186	179	189	10	193	196	199	202	
Transfer payments	0		0		44	44	44	44	
Support services	299	346	322		278	278	278	278	
Depreciation	1,061	1,240	1,240		1,240	1,240	1,240	1,240	
Revenue £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26	
Income	4,420	10,927	4,492	(185)	4,232	4,232	4,232	4,232	
Government grants	0		0		0	0	0	0	
Reimbursements	326	90	330	4	984	984	984	984	
Customer & client receipts	4,094	10,837	4,162	(189)	3,248	3,248	3,248	3,248	
Recharges	0		0		0	0	0	0	
Reserves									
Capital Funded									
Council Funded Net Budget	14,580	15,613	14,924	485	15,442	15,694	15,918	16,170	
Capital Budget £'000s	Final Budget 2020/21	Actual 2020/21	Budget 2021/22	Forecast Variance 2021/22 P7	Budget 2022/23	Budget 2023/24	Budget 2024/25	Budget 2025/26	
Waste Bins		0	17	0	13	0	0	0	
Fleet Vehicles		0	90	0	340	0	0	15,000	
Other		0	0	0	8	0	0	42	
	0	0	107	0	361	0	0	15,042	