

Please note this meeting will be held remotely

Thursday, 3rd November, 2022 - 10.00 a.m.

AGENDA

Page Nos.

1. **APOLOGIES FOR ABSENCE**
2. **DECLARATIONS OF INTEREST** - In terms of Section 5 of the Code of Conduct Members of the Committee are asked to declare any interest(s) in particular items on the agenda and the nature of the interest(s) at this stage.
3. **MINUTE** – Minute of the meeting of the Finance, Economy and Corporate Services Scrutiny Committee of 8th September, 2022. 3 – 5
4. **BUDGET WORKING GROUP – NOTE OF MEETING – 13TH OCTOBER, 2022** – Report by the Executive Director – Finance and Corporate Services. 6 – 8
5. **ANNUAL REPORT FOR THE EDINBURGH AND SOUTH EAST SCOTLAND CITY REGION DEAL** – Report by the Executive Director - Enterprise and Environment. 9 – 76
6. **BAD DEBTS 2021-22** – Joint report by the Head of Revenue and Commercial Services and the Head of Housing Services. 77 – 86
7. **FINANCE AND CORPORATE SERVICES DIRECTORATE PERFORMANCE REPORT** – Report by the Executive Director - Finance and Corporate Services. 87 – 96
8. **BUSINESS GATEWAY FIFE ANNUAL PERFORMANCE** – Report by the Head of Business and Employability Services. 97 – 105
9. **ENTERPRISE AND ENVIRONMENT DIRECTORATE: PLANNING SERVICES PERFORMANCE REPORTING** – Report by the Executive Director - Enterprise and Environment. 106 – 113
10. **ANNUAL HEALTH AND SAFETY REPORT 2021-22** – Report by the Head of Human Resources. 114 – 141
11. **ANNUAL PROCUREMENT REPORT** – Report by the Head of Revenue and Commercial Services. 142 – 203
12. **2022/23 REVENUE MONITORING PROJECTED OUTTURN** – Joint report by the Executive Director - Finance and Corporate Services and the Executive Director - Enterprise and Environment . 204 – 207
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13. 2022/23 CAPITAL MONITORING PROJECTED OUTTURN – Joint report by the Executive Director - Finance and Corporate Services and the Executive Director - Enterprise and Environment.	208 – 212
14. 2022/23 REVENUE MONITORING PROJECTED OUTTURN - FINANCE AND CORPORATE SERVICES – Report by the Executive Director - Finance and Corporate Services.	213 – 218
15. 2022/23 CAPITAL MONITORING PROJECTED OUTTURN - FINANCE AND CORPORATE SERVICES – Report by the Executive Director - Finance and Corporate Services.	219 – 223
16. FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE WORKPLAN – Report by the Executive Director - Finance and Corporate Services.	224 – 227

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

Lindsay Thomson
Head of Legal and Democratic Services
Finance and Corporate Services
Fife House
North Street
Glenrothes
Fife, KY7 5LT

27th October, 2022.

If telephoning, please ask for:

Wendy Macgregor, Committee Officer, Fife House, North Street, Glenrothes.
Telephone: 03451 555555, ext. 442178; email: Wendy.MacGregor@fife.gov.uk

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2022 FECSS 3

THE FIFE COUNCIL - FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE – REMOTE MEETING

8th September, 2022

10.00 a.m. – 11.00 a.m.

PRESENT: Councillors Allan Knox (Convener), Alistair Bain, Lynn Ballantyne-Wardlaw, Ian Cameron, Rod Cavanagh, Eugene Clarke, Sean Dillon, Graeme Downie, Stefan Hoggan-Radu, James Leslie, Kathleen Leslie (substituting for Robin Lawson) Gordon Pryde, Alistair Suttie and Ann Verner.

ATTENDING: Ken Gourlay, Executive Director, Enterprise and Environment; Pam Ewen, Head of Planning, Economy Planning and Employability Services; Gordon Mole, Head of Business and Employability, Economy Planning and Employability Services; Heather Honeyman, Assessor, Sharon McKenzie, Head of Human Resources, Elaine Muir, Head of Finance, Les Robertson, Head of Revenue and Commercial Services, and Lindsay Thomson, Head of Legal and Democratic Services, Finance and Corporate Services; William Penrice, Research Manager, Communities; Martin Kotlewski, Service Manager – BTS Solutions and Service Assurance; Donna Grieve, Accountant, Finance Service Business Partnering; Jackie Johnston, Accountant, Finance Service Business Partnering; Helena Couperwhite, Manager - Committee Services and Wendy MacGregor, Committee Officer, Committee Services, Legal and Democratic Services.

APOLOGY FOR ABSENCE: Councillor Colin Davidson.

4. DECLARATIONS OF INTEREST

No declarations of interest were submitted in terms of Standing Order 7.1.

5. MINUTE

The Committee considered the minute of the Finance, Economy and Corporate Services Scrutiny Committee of 15th June, 2022.

Decision

The Committee agreed to approve the minute.

6. SCRUTINY AT FIFE COUNCIL

The Committee considered a report by the Head of Legal and Democratic Services providing a summary of the scrutiny framework at Fife Council, additional information on the purpose of scrutiny activity and the approach that could be adopted when carrying out scrutiny. The report builds on introductory training that had been held for Conveners and members of the Scrutiny Committees.

Decision/

Decision

The Committee noted the contents of the report.

7. SERVICE PROFILES

The Committee considered a report by the Executive Director, Finance and Corporate services providing members with information on the roles and functions of Council Services within the remit of the Finance, Economy and Corporate Services Scrutiny Committee.

Decision

The Committee noted and considered the aims, functions and key challenges for each Service.

8. LOCAL GOVERNMENT BENCHMARKING FRAMEWORK PERFORMANCE INDICATORS

The Committee considered a report by the Executive Director, Communities providing context for elected members on the Local Government Benchmarking Framework (LGBF), a key element in service performance reporting.

Decision

The Committee noted the content of the report and the intention to use the Local Government Benchmarking Framework in future performance arrangements.

9. 2022/23 REVENUE MONITORING PROJECTED OUTTURN

The Committee considered a joint report by the Executive Director, Finance and Corporate Services and the Executive Director, Enterprise and Environment, updating members on the projected outturn financial position for the 2022/23 financial year at June, 2022, for the areas in scope of the Finance, Economy and Corporate Services Scrutiny Committee.

Decision

The Committee acknowledged the financial performance and activity at June 2022, detailed in the report and appendix.

10. 2022/23 CAPITAL MONITORING PROJECTED OUTTURN

The Committee considered a joint report by the Executive Director, Finance and Corporate Services and the Executive Director, Enterprise and Environment, updating members on the Capital Investment Plan and advising on the projected financial position for the 2022/23 financial year at June 2022, for the areas in scope of the Finance, Economy and Corporate Services Scrutiny Committee.

Decision

The Committee acknowledged the financial performance and activity at June 2022, detailed in the report and appendices.

11./

11. 2022/23 REVENUE MONITORING PROJECTED OUTTURN - FINANCE AND CORPORATE SERVICES DIRECTORATE

The Committee considered a report by the Executive Director of Finance and Corporate Services updating members on the projected outturn financial position for 2022/23 for the Finance and Corporate Services Directorate.

Decision

The Committee acknowledged the financial performance and activity for 2022/23 detailed in the report and appendices.

12. 2022/23 CAPITAL MONITORING PROJECTED OUTTURN - FINANCE AND CORPORATE SERVICES DIRECTORATE

The Committee considered a report by the Executive Director, Finance and Corporate Services updating members on the Capital Investment Plan and advising of the Projected financial position for the 2022/23 financial year for the Finance and Corporate Services Directorate.

Decision

The Committee acknowledged the financial performance and activity for 2022/23 detailed in the report and appendices.

13. FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE FORWARD WORK PROGRAMME

The Committee considered a report by the Executive Director, Finance and Corporate Services, providing guidance for members on the consideration of future items for inclusion on the work plan, by prioritising items with the biggest impact and highest levels of risk.

Decision

The Committee:-

- (1) noted the content of the report and Workplan for the Finance, Economy and Corporate Services Scrutiny Committee;
- (2) agreed to contact the Convener with suggested report items for scrutiny and inclusion on the Workplan; and
- (3) agreed to establish a politically balanced working group, composed of five Committee members (two SNP, one Labour, one Liberal Democrat and one Conservative), to consider and identify particular areas for Scrutiny of the budget, within the remit of the Finance, Economy and Corporate Services Scrutiny Committee.

Finance, Economy and Corporate Services Scrutiny Committee

Budget Working Group

Thursday 13 October 2022

Present: Cllr Alan Knox
Cllr Robin Lawson
Cllr Lynn Ballantyne-Wardlaw
Cllr Graeme Downie
Cllr Alistair Suttie

Attending: Eileen Rowand, Executive Director Finance and Corporate Services
Laura Robertson, Operations Manager, Finance Service

Cllr Knox outlined the purpose of the meeting which was to explore areas of interest that the Working Group could look at that would add value. Cllr Knox is keen that the Working Group does not duplicate the work of either of the Cabinet or the Standards & Audit Committees.

Eileen outlined where we were with the current budget process that was underway referencing the reports that had been presented to the August Cabinet Committee covering the Revenue Budget 2023-26 and the financial outturn for 2022-23.

The Revenue Budget 2023-26 report sets the scene for the financial challenge facing the Council over the next 3 years and the strategy to deal with 2023-24 and future financial years.

The Financial Outturn Report 2022-23 highlights an underspend of £58m largely due to late funding received from the Scottish Government and specific grant that needs to be carried forward. The high level of reserves was also highlighted along with the scale of funds earmarked and committed.
















The level of uncertainty facing Council finances was also discussed linked to the need to hold one off reserves to deal with shocks in finances.

Areas of potential interest that were raised by Members of the Working Group included: -

- Areas of underspend including staffing linked to recruitment issues – suggestion that this could be looked at on a thematic basis.
- The need for monitoring reports to be done on an exception basis.
- Areas where budgets are significantly increased in year. An example of another council was given whereby the refuse collection maintenance budget had trebled.
- Does the budget set out the right priorities?
- Is the language used in the budget setting process easy to understand?
- More information requested on the annual budget timetable.

It was agreed that Eileen would draft a short note of the meeting and share the budget timetable so that this could inform future work of the Working Group. A draft note would be shared with Cllr Knox in order that this could be reviewed and incorporated into the papers for the Scrutiny Committee on the 3 November 2022.

**FIFE COUNCIL
GENERAL FUND REVENUE BUDGET 2023-24
DRAFT TIMETABLE**

Timeframe	Action	Action Owner	Notes
End July	 Finance Led Budget Proposals for 2023-24 discussed with CET	Eileen Rowand/ Elaine Muir	
25th August	 Budget Update report to Cabinet Committee	Eileen Rowand	
31st October 2022	 UK Fiscal Statement (Including OBR Forecasts)	Eileen Rowand	
15th December	 Scottish Draft Budget Announcement (Not yet confirmed - dependant on impact of UK Budget announcement on 31st October)	Eileen Rowand	
Mid-End December	 Scottish Government Settlement due	Eileen Rowand	
	 Updated model assumptions after Settlement received	Eileen Rowand	
	 Briefing issued to Political Groups re. impact of Settlement on Budget Gap	Eileen Rowand	
Mid-End December	 Determine Finance Officers to provide support to other Political Groups		
Jan	 Provide brief for Political Party Leaders on budget progress		
18th January	 Budget report to Cabinet Committee following settlement	Eileen Rowand	
End Jan - Feb	 Consideration of Budget Proposals	Eileen Rowand/ Administration/ Political Group	
14th February	 Draft Administration Budget and General Fund Budget Report to be ready	Eileen Rowand/ Administration/ Political Group	
14th February	 Other Political Group Budget Proposals to be submitted to Head of Finance for sign-off		
13th February	 Budget Motion to be submitted (8 working days)	Eileen Rowand/ Administration/ Political Group	
20th February	 Budget Amendments to be ready (3 working days)	Administration/ Political Group	
23rd February	 Budget approved at full Council	Full Council	
w/c 28 February	 Officers Budget Co-ordination Group meeting	Elaine Muir	

3rd November, 2022
Agenda Item No. 5

Annual Report for the Edinburgh and South East Scotland City Region Deal

Report by: Ken Gourlay, Executive Director (Enterprise and Environment)

Wards Affected: Ward Nos. 1-15, 21,22

Purpose

This report provides information for elected members on the Annual Report for the Edinburgh and South East Scotland City Region Deal, including the Fife Industrial Innovation Investment (i3) Programme, which is funded through the Deal.

Recommendation(s)

Members are asked to note the information provided on the Annual Report for the Edinburgh and South East Scotland City Region Deal, including the Fife Industrial Innovation Investment (i3) Programme, attached as Appendix One.

Resource Implications

None.

Legal & Risk Implications

There are no legal and risk implications.

Impact Assessment

An Equality Impact Assessment (EqIA) is not required as there are no changes to existing service delivery and policy.

Consultation

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

1.0 Background

Edinburgh and South East Scotland City Region Deal

- 1.1 It is now four years since the Edinburgh and South East Scotland City Region Deal was signed and it continues to make excellent progress in delivering the £1.4 billion programme in partnership. The regional partnership brings together six local authorities, four universities, six colleges and the Regional Enterprise Council – made up of business, social enterprise and third sector representatives from across the region. With the approval of the business cases for the Edinburgh Innovation Hub and the Dunard Centre, 18 of the Deal's 20 projects are now being implemented. The Deal has demonstrated that partners can collaborate effectively to deliver cross-regional projects, create future regional infrastructure and strategically co-ordinate transport, housing and economic development.
- 1.2 Building upon the Deal, a Regional Prosperity Framework was approved by the Edinburgh and South East of Scotland City Region Joint Committee in September 2021, which identifies the strategic priorities where public and private investment would best drive the region forward in a sustainable and inclusive manner. A Delivery Framework for the Framework is currently being developed.
- 1.3 Beyond the Deal's projects, the regional cohesion and robust governance enables the partners to respond effectively to challenges and opportunities. Examples included in the Annual Report include: the Joint Committee endorsing the Forth Green Freeport bid to boost innovation and inclusive growth within the region's communities, developing a regional Bus Service Improvement Partnership to deliver £3.03m of regional bus improvements from the Scottish Government's Bus Partnership Fund.

Fife i3 Programme

- 1.4 The Fife i3 Programme is a £50 million, ten-year programme delivered by Fife Council with funding support from the Edinburgh and SE Scotland City Region Deal. The investment will deliver new business premises and immediately available serviced land. The new business accommodation will be located within existing business clusters in mid and south Fife, adjacent to growth corridors (M90 and A92). It aims to facilitate more joint working between the region's universities and Fife businesses, drive productivity and deliver higher value, skilled, permanent jobs from data driven innovation.
- 1.5 The Fife i3 Programme commenced in April 2019. Tranche 1 (Years 1-3) of the Programme's investment completed in March 2022. Tranche 2 started in April 2022, having secured Fife Council and Joint Committee approval in March 2021.
- 1.6 The Business Case Tranche 2 of the Programme sets out the detailed arrangements for years four to six of the Fife i3 Programme and confirms the agreed profile for investment, grant drawdown and Council's capital contribution. Since the original Programme business case was approved, the COVID-19 pandemic, EU Exit and inflation has affected programme delivery (in particular costs and timescales). The Tranche 2 business case reflects a base case expected scenario that factors in the latest information on this and other risks. This is a time of significant uncertainty for construction projects and, where possible, actions to mitigate risk are being identified and delivered in parallel with the delivery of the Programme. Demand for business space remains strong.

2.0 City Region Deal Annual Report 2021 – 2022

2.1 City Region Deal Overview

- 2.1.1 The 23 City Region Deal projects are listed in Page 10 of the Annual Report in Appendix 1, “Table 1: Status of Programmes and Projects - 1 April 2022”. 2 projects have still to complete their business cases. 14 of the projects in delivery are on target to be completed on time and to budget. 9 projects are delayed but within acceptable range, with management action in place to address the issue. 6 projects that have been implemented are now started to realise their expected benefits.

2.2 Governance

- 2.2.2 The City Region Deal has a comprehensive governance structure. This is summarised in the diagram on Page 13 in the Annual Report.

2.3 Financial Statement

- 2.3.1 The City Region Deal identifies new and more collaborative ways that partners will work with United Kingdom Government and Scottish Government to deliver change to the regional economy. The Governments will jointly invest £600 million over the next 15 years and regional partners committed to adding in excess of £700 million, overall representing a deal worth £1.3 billion. Since the Deal was signed, partner investment projections have increased by over £84m. As a result, the value of the Deal is now almost £1.4 billion. A summary of the City Region Deal total over a fifteen-year period is shown in the Table 2, Page 14 in the Annual Report.

2.4 The Deal – summary of progress

- 2.4.1 Section 4 of the Annual Report from Page 15 summarises the themes, programmes, and projects within the City Region Deal. It details the progress that has been made in line with the Implementation Plan. It reports that the Data Driven Innovation (DDI) programme launched, in July 2022, of the Data Loch service. This established the governance and technical infrastructure to permit researchers to apply for health and social care data access. Notably, the governance was informed by gathering public perspectives around access to health data. The construction work on the DDI Hubs is expected to complete in 2023/24.
- 2.4.2 The Integrated Regional Employability and Skills (IRES) Programme and its cross-sector partnership seeks to evolve regional labour market policy and practice to help drive inclusive growth. The programme continues to focus on five improvement pillars targeting known areas of weakness or opportunity. Headline achievements are set out from Page 43 – 47 of the Annual Report.
- 2.4.3 The IRES partnership is funded by £25 million investment (over eight years) and will deliver an additional 14,700 skill improvements; 5,300 people into employment; and a further 500 career enhancements through its seven themes: 1. Integrated knowledge management systems; 2. Labour market analysis and evaluation; 3. Integrated employer engagement; 4. Intensive family support service; 5. Housing construction and infrastructure (HCI) targeted skills gateway; 6. Data-driven innovation (DDI) targeted skills gateway; and 7. Workforce mobility.
- 2.4.4 Fife Council is the lead partner for the Intensive Family Support Service (IFSS). This engaged with 274 individuals (214 adults, 60 young people) across the City Region, delivering a combination of Family Support Work, Advice and Income Maximisation and Employment support. A Phase One evaluation was completed encapsulating the first two years delivery. This focussed on individual services, as well as the overall

programme, identifying common themes, best practices and innovative intervention including recommendations to inform Phase Two of the programme. The service has expanded into five early years centres in Edinburgh due to funding secured through positive impacts and outcomes experienced by families who have engaged across the region

2.5 Fife Industrial Innovation Investment (i3) Programme – Update on Progress

2.5.1 The summary of progress against the Implementation Plan is set out in Pages 37/8 in the Annual Report. Five sites have been developed in Glenrothes, Kirkcaldy, Dalgety Bay, Lochgelly and Dunfermline during the first three years of the Programme. 5.4 Ha of immediately available employment land is now ready for private sector investment, along with almost 1,900 m² of newly developed business space. The completed units are more than 90% occupied.

2.5.2 The Edinburgh and SE Scotland City Region Deal Annual Report for 2021/22 records the completion of the key milestones.

- Completion of seven new business units at Dunnikier Business Park, Kirkcaldy
- Phase 1, Site Servicing contract complete at Lochgelly
- Construction Project underway at Hillend and Donibristle Industrial Estate, Dalgety Bay completed in September 2022
- Business Units at Queensway, Glenrothes are fully let
- Implementation of Tranche 2 of the Fife i3 Programme is underway

2.5.3 The next milestones that will be reported in the 2022/23 Annual Report include:

- Sep 2022 - Completion of Business Units at Hillend and Donibristle Industrial Estate, Dalgety Bay
- Dec 2022 - Fife Interchange North Site Servicing Project Complete
- Q3 2022 - Fife Interchange North Business Units start on site
- Q3 2022 - Lochgelly Site Servicing Initial Ground works complete
- Q3 2022 - Survey of tenants to take place
- Q2 2023 - Site Acquisition complete of site 3 at Hillend & Donibristle Industrial Estate

2.5.4 As set out in the Plan4Fife, Fife Council's strategic inclusive growth priority is the Mid-Fife Area. All projects in the Fife i3 Programme are considered within the context of their contribution to inclusive growth and the locations for investment have been selected based on criteria that include: Ability to support strategic business clusters; Location / connectivity to strategic growth corridors (M90, A92); Fit with existing predominant land use; Potential impact on sensitive or incompatible land uses; and potential to deliver lower-cost business space.

2.5.5 Work continues to develop the Programme's approach to sustainable construction. The new builds use a standard specification. This has been reviewed as part of the design activities for projects in Tranche 2, using the Green Book Business Case Carbon Requirements to quantify and reduce whole life carbon emissions.

2.5.6 As a result of changing external circumstances, there is a risk that construction costs will vary significantly from the expected budget, which may result in overspends and a need to reprofile the programme plan and a resulting impact on the delivery of programme benefits. The Annual Report summarises the results from four years of delivery of the City Region Deal for Edinburgh and South East of Scotland city region. There is currently £1.050m slippage on the Fife i3 programme in 22/23. However, the Programme had advanced spend in previous years and this has been offset by slippage in 2022/23 to bring the project in on time and budget. However, the risks from construction inflation and materials and trades shortages will require constant management to continue to do so. A range of actions are being used to manage this risk. For example, there is ongoing engagement with the contractors and the supply chain to establish what we, the client, can do to minimise any impact. The business case for the Programme and its forecast costs does include provision for inflation. The rate is being kept under review as the markets change.

3.0 Conclusions

- 3.1 The Annual Report summarises the results from four years of delivery of the City Region Deal for Edinburgh and South East of Scotland city region.
- 3.2 There is currently £1.050m slippage on the Fife i3 programme in 2022/23. However, the Programme had advanced spend in previous years and this has been offset by slippage in 2022/23 to bring the project in on time and budget. However, the risks from construction inflation and materials and trades shortages will require constant management to continue to do so. However, the risks from construction inflation and materials and trades shortages will require constant management to continue to do so.

List of Appendices

1. Annual Report 2021/22 for the Edinburgh & South East Scotland City Region Deal.

Background Papers

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

- Fife Council Policy & Coordination Committee, 4 November 2021, Item 6 Edinburgh and South East of Scotland City Region Deal and Regional Growth Framework, see: <https://www.fife.gov.uk/-Agenda-Policy-and-Co-ordination-Committee-4th-November-2021.pdf>
- Fife Council Policy & Coordination Committee, 19 November 2020, Item 11 Fife Industrial Innovation Investment Programme – Edinburgh and South East Scotland City Region Deal - Full Business Case for Tranche 2, see: <https://www.fife.gov.uk/Agenda/Policy-and-Co-ordination-Committee-of-19-November-2020-Remote-Public-Agenda-Pack.pdf>

Report Contact

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CITY REGION DEAL

Edinburgh
& South East
Scotland

ANNUAL REPORT 2021 – 2022





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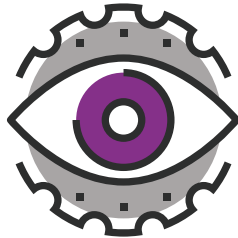


Executive Summary

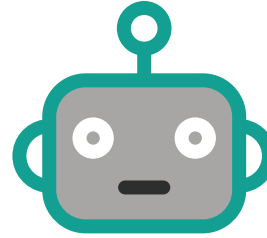
Key Achievements



£58.1m of Government funding spent in 2021/22 – **£226m** (38% of total since 2018/19)



21 of the **23** projects now in **Implementation** or **Delivery** phase



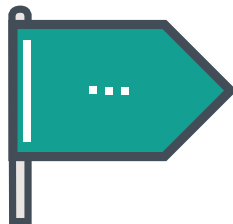
Construction of **£22.5m National Robotarium** complete.



46,000 public engagements with Easter Bush Science Outreach Centre



6 new data-driven **Masters programmes** launched at Edinburgh Futures Institute



73 data output projects delivered by DataLoch



IRES programme has **improved the skills of 18,000 people** and helped 620 people into work



£82,000 of **Data Skills Credits** awarded, benefiting 264 learners



Construction of 75 net zero carbon homes began in Granton Waterfront



350 mid-market rental homes have been completed through Edinburgh Living



Executive Summary

Timeline



£3m awarded to the Region through the Bus Partnership Fund



Green Skills research completed by Labour Market Analysis & Evaluation programme



ESEScommunities.org launched as a portal to assist in delivering for community benefits across the programme



Granton Waterfront Regeneration Outline Business Case approved by Joint Committee



Independent global data institute for child safety established (supported by Edinburgh Futures Institute DDI programme)



Short videos produced raising awareness of the **DDI** and **HCI** Skills Gateways



Commencement of the Junction Works for Edinburgh Innovation Hub (Queen Margaret University)



Proud to Care videos and campaign launched to attract staff to the Health and Care sector



Business Case for Dunard Centre approved by Joint Committee



Regional Prosperity Framework for Delivery complete, which will be a catalyst for Regional Prosperity



Joint Committee **endorsed the Forth Green Freeport** bid to boost innovation and inclusive growth within our communities



Topping out ceremony for Usher Institute



Executive Summary

Video Highlights

A showcase of the diverse and innovative initiatives supported by the Edinburgh and South East Scotland City Region Deal, featuring the people and organisations behind the projects, their delivery partners across the region, and those who are benefiting.

Gaelic Speech Recognition Tool

The award-winning Speech Recognition Tool for the Gaelic language received support through the City Region Deal's Data-Driven Innovation initiative. We caught up with Will Lamb from the University of Edinburgh and Margaret Cameron from MG Alba to hear how partnership working has helped the delivery of benefits from the project.



The International Severe Acute Respiratory Infection Consortium (ISARIC)

City Region Deal investment in supercomputing and data analytics is helping projects such as ISARIC4C, the largest study of hospitalised patients with Covid19. We spoke to Lucy Norris and Wilna Oosthuizen from the University of Edinburgh to hear more about this life saving project.



Easter Bush Science Outreach Centre

Run by the Roslin Institute's Public Engagement team, the Easter Bush Science Outreach Centre is contributing towards City Region Deal goals of increasing data and digital skills in South East Scotland. Jayne Quoiani, Education & Engagement Officer at the Roslin Institute, and Amy Dixon, Education Manager for Early Years and Primary at SSERC, explain how they worked together to support primary staff and learners.



Creative Informatics

The ground breaking Creative Informatics programme is one of many projects that have received support through the City Region Deal's Data-Driven Innovation initiative. We caught up with Nicola Osborne from the University of Edinburgh and artist Andrew Brooks to hear more about how the programme is helping creative entrepreneurs in South East Scotland.



Job retention in the Scottish football industry

This partnership with many of Scotland's top football clubs received support through the City Region Deal's Data-Driven Innovation initiative. We caught up with Grant Jarvie from the University of Edinburgh and Sam Tanenbaum from Hibernian football club to hear how the project helped fans and clubs during the Covid19 pandemic.





Executive Summary

Dunard Centre

The creation of a new world-class performance venue in Edinburgh is underway. This dedicated new space for music and the performing arts will provide a hub for a wide variety of performance. We spoke to Emma Clark and her mum, Elaine Clark, about why they are excited to welcome this venue, and Gavin Reid, Chair of Impact Scotland, who explained what the region might expect from the Dunard Centre.



Intensive Family Support Service (IFSS)

IFSS is a regional service that takes a tailored, needs-led approach to supporting families experiencing multiple disadvantages. Kerry Jones, a family support worker from Fife Gingerbread explains more about the service whilst a family who has received support from IFSS tell us about the benefits they have experienced.



Integrated Employer Engagement (IEE)

Ellen Munro, Integrated Employer Engagement Manager, explains how the project supported employers with skills gaps and recruitment challenges through a targeted Health and Social Care training programme. Karen Feeley, a long-term unemployed, stay-at-home mum, also tells us how she overcame several barriers to secure employment after completing this programme and is now progressing to a senior position with a local Fife care provider.



Regional Community Wealth Building (CWB)

www.esescommunities.org, launched through the Integrated Employer Engagement Project, continues to link charitable and community causes to commercial suppliers to address the needs of local communities under the CWB agenda. This video tells the story of how Maxi construction, based in Livingston, provided cross regional food donations to the value of £2,000 to organisations in Edinburgh and the Scottish Borders, including Pennywell Pantry, Burnfoot Community Hub and Hawick Salvation Army.



The National Robotarium

Ross Clark, from Heriot-Watt University, and David Cairns, of Robertsons Central East, explain how the National Robotarium - one of six data-driven innovation hubs created through the City Region Deal - has made community outreach and the delivery of community benefits a big part of the Robotarium's construction and activities.





1. Forewords

Cllr Russell Imrie

Convener of the Edinburgh and South East Scotland City Region Deal Joint Committee

It is now four years since the Edinburgh and South East Scotland City Region Deal was signed, and we continue to make excellent progress in delivering the £1.4 billion programme in partnership. The regional partnership brings together six local authorities, four universities, six colleges and the Regional Enterprise Council – made up of business, social enterprise and third sector representatives from across the region.

With the approval of the business cases for the Edinburgh Innovation Hub and the Dunard Centre, 18 of the Deal's 20 projects are now being implemented. Greater detail about every project is in **Section 4**.

Short videos throughout the report highlight the positive impact that projects are already having on our residents' lives.

Building upon the Deal, a Regional Prosperity Framework was approved in September 2021, which identifies the strategic priorities where public and private investment would best drive the region forward in a sustainable and inclusive manner. A Delivery Framework will be considered in September 2022. You can read more about this regional collaboration in **Section 5**.

Beyond the Deal's projects, our regional cohesion and robust governance enables us to respond effectively to challenges and opportunities. Examples include:

Cllr Russell Imrie



- Developing a regional Bus Service Improvement Partnership to deliver £3.03m of regional bus improvements from the Scottish Government's **Bus Partnership Fund**.
- Joint Committee **endorsing the Forth Green Freeport** bid to boost innovation and inclusive growth within our communities.
- Contributing our regional perspective to key consultations including National Planning Framework 4; the National Strategy for Economic Transformation; and the Strategic Transport Projects Review 2.
- Establishing a series of regional propositions for the region's six local authorities to bid into together to the UK Government's **Shared Prosperity Fund** over the next three years.

For our local, regional and national wellbeing, we will continue to work in partnership to realise our ambitions for a strong and sustainable economic recovery, where the benefits are enjoyed by all.



1. Forewords

Claire Pattullo and Garry Clark

Chair and Vice Chair of Regional Enterprise Council

It has been a pleasure to reflect on the significant progress made in Year 4 of the Edinburgh and South East Scotland City Region Deal. The Regional Enterprise Council (REC) was formed in November 2018 to advise the Deal's decision-making body, the Joint Committee, on the delivery of projects across the city region and to encourage further investment opportunities. In directly participating on the Joint Committee, we represent business, social enterprise and wider third sector across the region and help to ensure that the benefits from the Deal support our shared ambition for achieving sustainable and inclusive economic growth throughout the city region. The REC has significant representation on the Elected Member Oversight Committee - which has shaped the ambition and strategic direction of the Regional Prosperity Framework which is the articulation of the next phase of the development of the regional economy.

REC members bring a broad range of experience, expertise and wide networks to best represent business, social enterprise and wider third sector across the city region.

We helped to develop the Regional Prosperity Framework vision in 2021 and have continued to help shape the related Framework for Delivery. The REC has influenced tourism and Community Wealth Building activity across the region, promoted good quality housing and sustainable communities and lent its advocacy to the Forth Green Freeport bid in June 2022.



Claire Pattullo
Edinburgh Social Enterprise Network



Garry Clark
Federation of Small Businesses

There was particular support for the bid's strong focus on quality jobs, upskilling, small business facilities and a 'Just Transition' away from hydrocarbons. This should help to both tackle inequalities and to achieve our net-zero carbon aspirations.

REC members have responded to presentations on the QMU Food and Drink Hub and the Dunard Centre business cases as well as being represented on the Integrated Regional Employability & Skills (IRES) Board where initiatives such as the **Proud to Care** campaign demonstrate the ability of IRES to be proactive in supporting the staffing crisis in the health and care sector.

The REC is particularly determined to promote the use of Community Wealth Building, to ensure that every Deal programme works together to maximise synergies. We therefore welcomed additional funding for the regional Community Wealth Building project focused on maximising community benefits via the **regional portal** and building an anchor network.

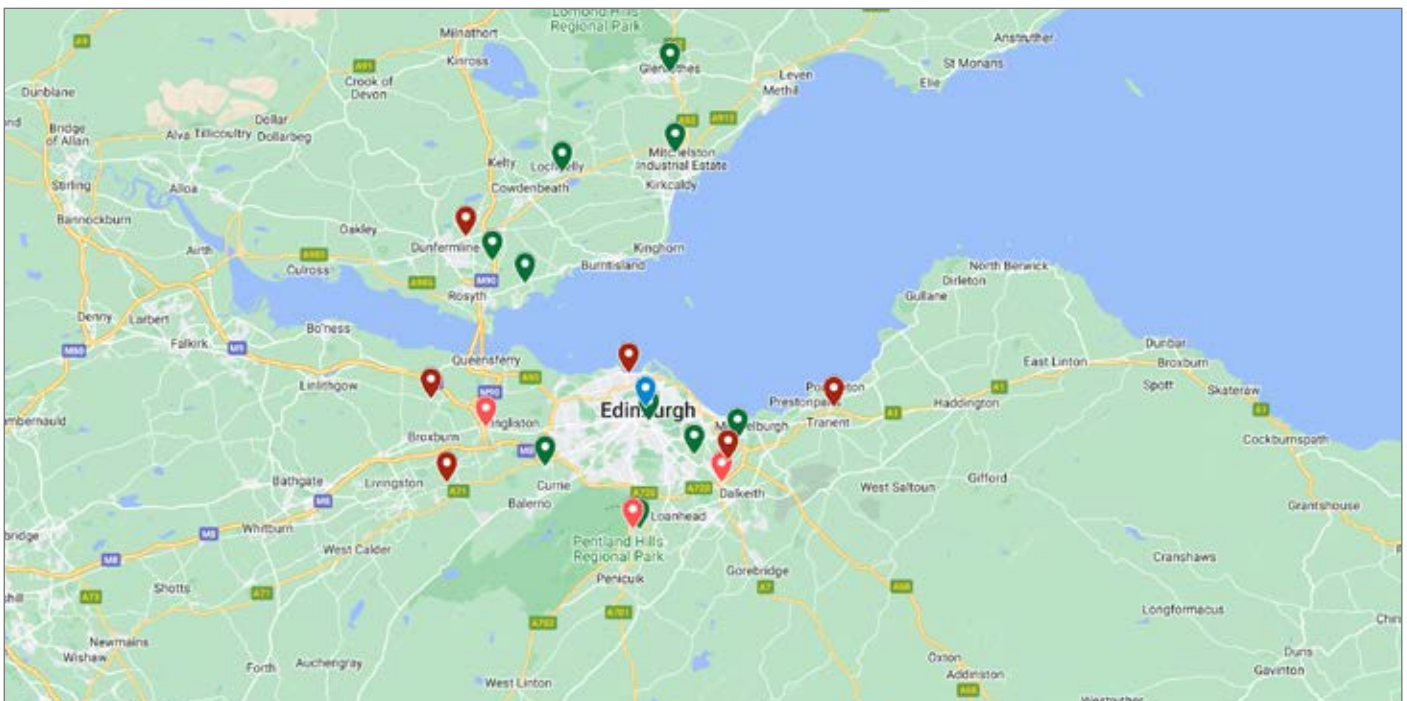
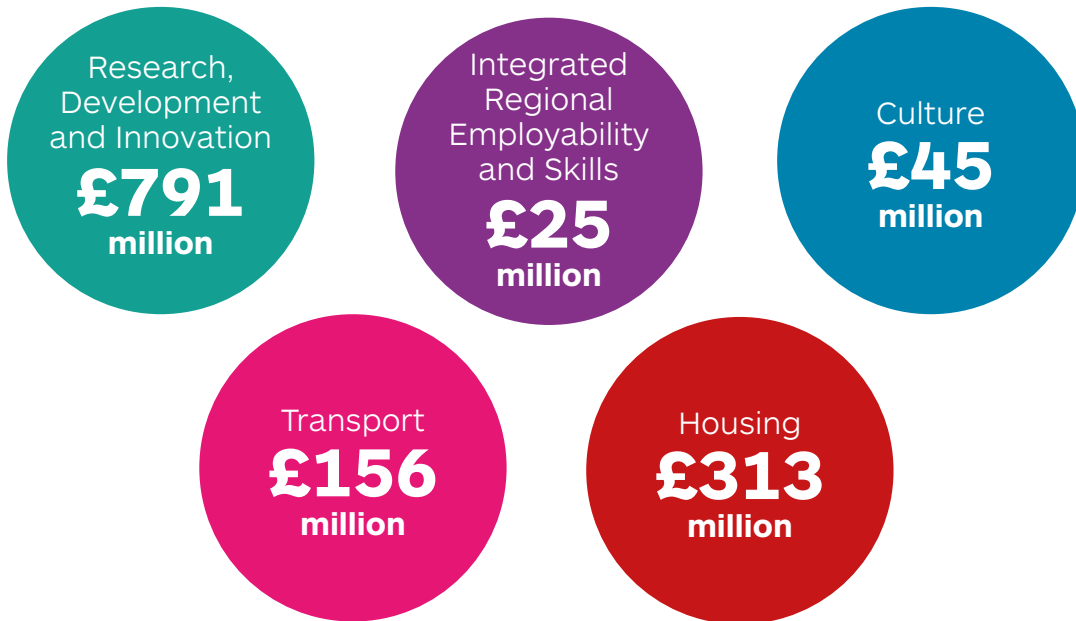
We look forward to promoting inclusive growth ambitions still further through both City Region Deal activities and wider regional collaboration.



2. City Region Deal Overview

Status of Projects and Finances

The Edinburgh and South East Scotland City Region Deal is a **£1.4 billion, 15-year programme** aimed at driving productivity and reducing inequalities through five key themes:



This map shows where the projects are located across the region

Integrated Regional Employability and Skills (IRES) activity spans across the whole City Region and is integrated into all projects.

- Research, Development and Innovation
- Transport
- Culture
- Strategic Housing Sites



2. City Region Deal Overview

The 23 City Region Deal projects are listed in the Table below. More detail on the projects, including their current status in **Section 4**.

Table 1: Status of Programmes and Projects – 1 April 2022

Theme/Programme/Project	Location	(Expected) Business Case Approval	Stage	On Time?	On Budget?
Research, Development and Innovation					
Edinburgh International Data Facility (Previously known as World Class Data Infrastructure)	Edinburgh/Midlothian	Dec 18	2. Implement		
Bayes Centre	City of Edinburgh	Dec 18	3. Deliver		
National Robotarium	City of Edinburgh	Dec 18	2. Implement		
Edinburgh Futures Institute	City of Edinburgh	Mar 19	2. Implement		
Usher Institute	City of Edinburgh	Sep 19	2. Implement		
Easter Bush	Midlothian	Mar 21	2. Implement		
Edinburgh Innovation Park (Food and Drink Innovation Hub)	East Lothian	Jun 21	2. Implement		
Fife Industrial Innovation Investment	Fife	Mar 19	2. Implement		
Borders Innovation Park	Scottish Borders	Mar 19	2. Implement		
Integrated Regional Employability and Skills	Cross-Regional	Dec 18			
Integrated Knowledge Systems	Cross-Regional	Jun 19	3. Deliver		
Labour Market Analysis and Evaluation	Cross-Regional	Jun 19	3. Deliver		
Integrated Employer Engagement	Cross-Regional	Jun 19	2. Implement		
Intensive Family Support	Cross-Regional	Mar 19	3. Deliver		
Data-Driven Innovation Skills Gateway	Cross-Regional	Mar 19	2. Implement		
Housing and Construction Infrastructure Skills Gateway	Cross-Regional	Mar 19	2. Implement		
Workforce Mobility	Cross-Regional	Jun 19	2. Implement		

Table continues overleaf



2. City Region Deal Overview

The 23 City Region Deal projects are listed in the Table below. More detail on the projects, including their current status in **Section 4**.

Table 1: Status of Programmes and Projects – 1 April 2022

Theme/Programme/Project	Location	(Expected) Business Case Approval	Stage	On Time?	On Budget?
Transport					
West Edinburgh	City of Edinburgh	Sept 23	1. Define		
A720 (Sheriffhall Roundabout)	Edinburgh/Midlothian	TBC	1. Define		
Culture					
Dunard Centre	City of Edinburgh	Mar 22	2. Implement		
Regional Housing Programme	Cross-Regional	Sep 19 (work prog report)			
Affordable Housing Programme	Cross-Regional	N/A	3. Deliver		N/A
Seven Strategic Sites	Cross-Regional	Winchburgh: Aug 18 Dunfermline: Jun 21 Granton: Dec 21	2. Implement		
Innovation and Skills	Cross-Regional	Others TBC	2. Implement		N/A
Edinburgh Living (housing company)	Cross-Regional		3. Deliver		

Project Stages

Stage no.	Definition
1. Define	Business case being developed, and not yet approved by Thematic Board and Joint Committee.
2. Implement	Business case has been approved by Thematic Board and Joint Committee, and is being implemented. In a capital project, this may be construction; for skills projects this may be establishing a course or system.
3. Deliver	Project is in place and benefits realisation framework to assess if it is achieving its objectives.
4. Legacy	Project has resulted in mainstreaming or improvements to business as usual (impact) that is generated beyond the funded period.

T: Status against **timeline** set out in business case/implementation plan **B:** Status against budget set out in financial plan

RAG Status	Definition – Timeline	Definition – Budget	Action Required
	In line with business case/ implementation plan	In line with spend set out financial plan for the current financial year.	No management action required
	Delay exists but is considered acceptable by PMO.	Spend is within acceptable range from what is set out financial plan for the current financial year. Project lead is confident that spend will be to profile at financial year end.	Management action is in place by senior management to address issues, and project is being closely monitored.
	Delay is significant.	Spend is outwith acceptable range from what is set out financial plan for the current financial year. Project lead does not consider that spend will be to profile at financial year end.	Immediate action is required by senior management and relevant Boards as appropriate to address issues. Issues must be highlighted to Government.



2. City Region Deal Overview

Stages

As of 1 August 2022:

2 Projects are in



Define, which means that the project's business case is yet to be completed

15 Projects are in



Implement, which means that the project's business case has been approved by Joint Committee and is in the process of being implemented

6 Projects are in



Deliver, which means that the project has been implemented and is working towards delivering its objectives

Time and Budget

14 Projects

are considered to be on target to be completed on time (green score) or have been completed on time

9 Projects

are delayed, but considered to be within an acceptable range, with management action in place to address the issue (amber score)

19 Projects

are considered to be on target to be completed within the specified budget so far for the 2022/23 financial year (green score) or have been completed within the specified budget

2 Projects

are projected to cost more than the specified budget so far for the 2022/23 financial year, but considered to be within an acceptable range, with management action in place to address the issue (amber score)

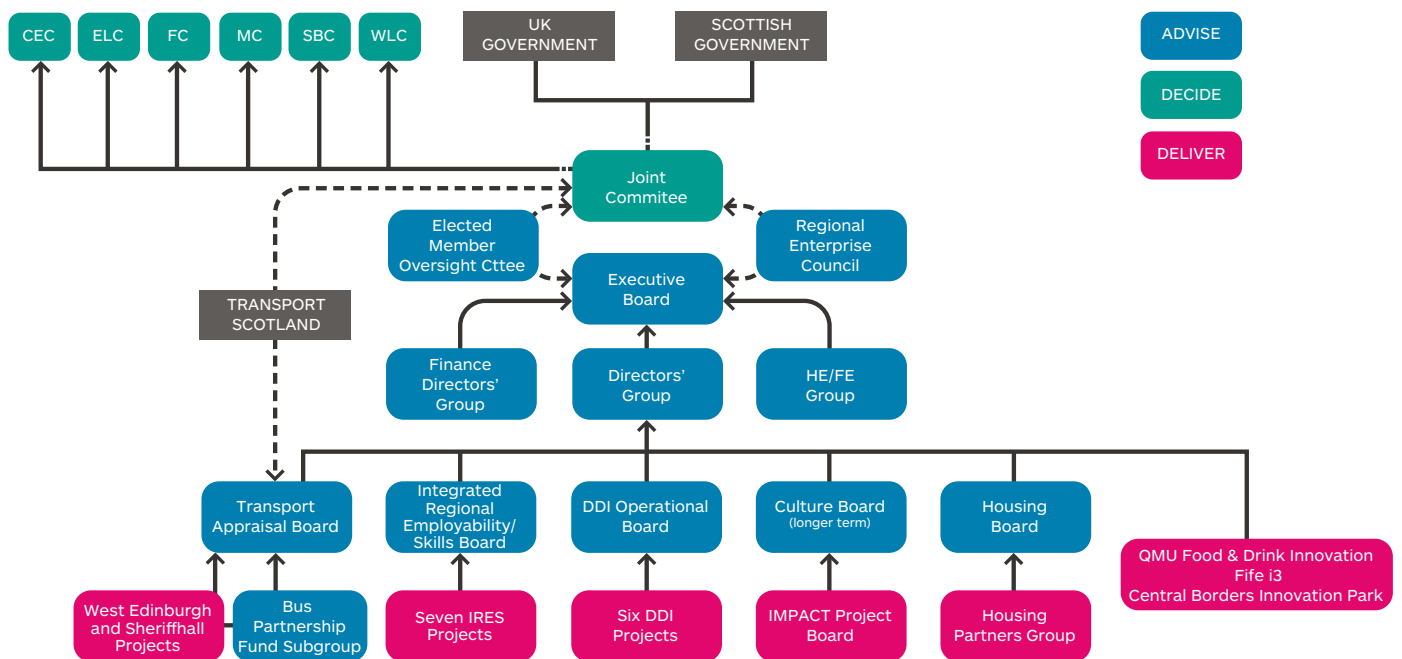


2. City Region Deal Overview

Governance

The City Region Deal has a comprehensive governance structure. This is summarised in the diagram below. There is more detail on the Boards and Groups in Section 3 of the **Deal Document**:

Functioning Governance





3. Financial Statement

This City Region Deal identifies new and more collaborative ways that partners will work with United Kingdom Government and Scottish Government to deliver change to the city regional economy. The Governments will jointly invest £600 million over the next 15 years and regional partners committed to adding in excess of £700 million, overall representing a deal worth £1.3 billion. Since the Deal was signed, partner investment projections have increased by over £84m. As a result, the value of the Deal is now almost £1.4 billion. A summary of the City Region Deal total over a fifteen-year period is shown in the Table 2:



Table 2 Edinburgh and South-East Scotland City Region Deal Financial Summary

Project	SG Contribution (£m)	UKG Contribution (£m)	Partner Contribution (£m)	Total Funding (£m)
Bayes Centre	2.24	30.31	68.50	101.05
Borders Innovation Park	15.00	0.00	14.14	29.14
Easter Bush	1.27	16.10	27.84	45.21
Easter Bush Link Road	0.00	10.90	19.10	30.00
Edinburgh Futures Institute	2.24	55.68	142.67	200.59
Edinburgh Innovation Hub	1.42	28.58	21.45	51.45
Edinburgh International Data Facility	0.67	78.93	119.45	199.05
Fife i3 Programme	35.00	0.00	15.10	50.10
National Robotarium	1.43	21.04	0.00	22.47
Usher Institute	0.73	48.46	37.05	86.26
Total Research, Development & Innovation	60.00	290.00	465.31	815.31
Dunard Centre	10.00	10.00	54.93	74.93
Total Culture	10.00	10.00	54.93	74.93
Integrated Regional Employability & Skills Programme	25.00	-	-	25.00
Total Integrated Regional Employability & Skills	25.00	-	-	25.00

Table continues overleaf



3. Financial Statement

Project	SG Contribution (£m)	UKG Contribution (£m)	Partner Contribution (£m)	Total Funding (£m)
A720 Sheriffhall Roundabout*	120.00	-	-	120.00
West Edinburgh Public Transport Improvement Programme	20.00	-	16.00	36.00
Total Transport	140.00	-	16.00	156.00
New Housing Partnership – Edinburgh Living**	15.00	-	248.00	263.00
Housing Infrastructure Fund**	50.00	-	-	50.00
Total Housing	65.00	-	248.00	313.00
Grand Total	300.00	300.00	784.23	1,384.23

*Includes £120m for Sheriffhall roundabout to be delivered by Transport Scotland.

** Funding issued by Scottish Government (Housing). Partner contribution of £248m relates to CEC on-lending.



3. Financial Statement

The City Region Deal Financial Summary for the period of April 2021 to March 2022 is set out in Table 3.

Total expenditure for the year amounted to...



Table 3 Edinburgh and South-East Scotland City Region Deal 2021-22

Project	2021-22	Cumulative (2018/19 - 2021/22)	
	CRD Expenditure (£'000)	CRD Expenditure (£'000)	CRD Expenditure as % of Funding
Bayes Centre	0	32.55	100%
Borders Innovation Park	2.13	2.33	16%
Easter Bush	0	16.42	95%
Easter Bush Link Road	0.39	0.39	4%
Edinburgh Innovation Hub	0	0	0%
Edinburgh Futures Institute	8.02	57.92	100%
Edinburgh International Data Facility	7.24	40.23	51%
Fife i3 Programme	4.29	9.34	27%
National Robotarium	13.26	15.32	68%
Usher Institute	16.02	21.77	44%
Total Research, Development & Innovation	51.35	196.27	56%
Dunard Centre	1.88	1.88	9%
Total Culture	1.88	1.88	9%
Integrated Regional Employability & Skills Programme	4.07	7.49	30%
Total Integrated Regional Employability & Skills	4.07	7.49	30%
A720 Sheriffhall Roundabout*	0.78	5.23	4%
West Edinburgh Public Transport Improvement Programme	0.10	0.11	1%
Total Transport	0.88	5.34	4%
New Housing Partnership – Edinburgh Living**	0	15.00	100%
Housing Infrastructure Fund**	0	0	0%
Total Housing	0	15.00	23%
Grand Total	58.19	225.98	38%

*Scottish Government funded. Transport Scotland taking forward scheme delivery.
 ** Funding issued by Scottish Government (Housing).

The Deal overall expended £225.98m of the £600m government funding from August 2018 to March 2022. This includes funding issued by Transport Scotland and Scottish Government Housing Department.



4. The Deal – summary of progress

This section summarises the themes, programmes and projects within the City Region Deal. It details the progress that has been made in line with the Implementation Plan.



Quarterly performance reports are shared between the Project Management Office (PMO) and Governments throughout the year and are published at each Joint Committee meeting.



4. The Deal – summary of progress

Data-Driven innovation

In last year’s report, the **Data-Driven Innovation** (DDI) initiative reported that it had drawn down almost £52 million in Government funding via the Edinburgh and South East Scotland City Region Deal, as investment for the creation of the DDI hubs – the Bayes Centre, Edinburgh Futures Institute, Usher Institute, Easter Bush, Edinburgh International Data Facility, and National Robotarium. This year, total drawdown in the local authority financial year to 31 March 2022 was £34 million.

The results of capital investment from United Kingdom and Scottish Governments are now becoming tangible, as construction work is expected to complete in 2023/24. In total, the DDI Innovation Hubs have added 53,000 square meters of innovation space – equivalent to ten football pitches. With every passing year since the launch of the DDI initiative in 2018, there are more and more examples of research, partnerships and other activities that have received support from the programme.

Another important step forward was the launch, in July 2022, of the DataLoch service. This milestone confirmed the establishment of the governance and technical infrastructure to permit researchers from any organisation to apply for health and social care data access. Notably, the governance was informed by gathering public perspectives around access to health data.

There are more highlights and details on the following pages from each of the DDI hubs.



THE UNIVERSITY
of EDINBURGH

HERIOT
WATT
UNIVERSITY



**Data-Driven
Innovation**





4. The Deal – summary of progress

Bayes Centre

The Bayes Centre is a one-stop shop for technical data science and Artificial Intelligence expertise, facilitating data-driven innovation by partnering with a wide range of private and public collaborating organisations.

The Centre builds on the University of Edinburgh’s academic excellence in the mathematical, computational, engineering, and natural sciences and translates these combined strengths to impact through the application of digital technology, robotics and autonomous systems, and space and satellites to the challenges of partners. Data science education, tech entrepreneurship and industrially driven, multidisciplinary Research and Development are the core pillars of its strategy to impact lives positively across the city, our region, nationally, and internationally.

Having opened in October 2018, the Bayes Centre has a growing track record of activities and outputs - including the creation of new high-value jobs, generating R&D investment, helping start-ups secure funding and helping thousands of people develop new data skills. Work has progressed at pace despite the COVID-19 disruption in 2020/21, with the team looking forward to welcoming a range of new members and partners during 2021/22 to join the 30 external organisations and programme participants who are co-located in our award- building.



The Bayes Centre is the University of Edinburgh’s innovation hub for Data Science and Artificial Intelligence



The Bayes Centre held EIE London, an Innovation Showcase, hosted by First Minister of Scotland, Nicola Sturgeon and with speakers including Lord Mayor, City of London, Vincent Keaveny and London Stock Exchange CEO Julia Hoggett



First Minister of Scotland, Nicola Sturgeon hosted EIE London on behalf of the Bayes Centre



4. The Deal – summary of progress

Headline achievements in 21/22

- Increased student numbers in the online learning programme **Data Science, Technology, and Innovation (DSTI) programme**.
- Developed online course with The Data Lab in Data Entrepreneurship for PhD students.
- Launched development plan to grow **Space & Satellites research activity**.
- Academic engagement strengthened through streamlining of **Alan Turing Institute** activities management into Bayes operations.
- Developed and deployed **OpportunityMatch** as a tool to easily discover University of Edinburgh academic expertise.
- **Data Science Unit** established including development of consultancy framework, delivery model and publicity. The initial tranche of commercial projects is now underway.
- Established the PhD and early career academic entrepreneurial **Venture Builder Incubator** programme. The programme received 56 applications from which a cohort of 27 was selected.
- Cohort 4 of the Bayes **AI Scale-up Accelerator**, received over 90 applications – from young dynamic AI companies worldwide. The final cohort of 15 continue their journey on the programme. Previous cohorts of the Scale-up Accelerator have secured over £16 million funding to date.
- Thirty-six companies were selected to form the **EIE21 cohort**, with the event held virtually on 10 June.

Next milestones (2022/23)

Due Date	Milestone
Oct 22	Appoint annual cohort of Bayes innovation fellows
Oct 22	Define strategy for discovery of available data assets
Jul 23	Continue scaling up the Data Science, Technology and Innovation programme, aiming for a target of 550 student course enrolments for 22/23
Jul 23	Undertake a series of Bayes-led seed funding projects
Jul 23	Engage in 26 innovation projects with external partners
Jul 23	Create/accelerate 24 companies through entrepreneurship support programmes



4. The Deal – summary of progress

Easter Bush

The Easter Bush Agritech hub seeks to leverage existing world-class research institutes and commercialisation facilities to place Easter Bush as a global beacon of Agritech excellence. This will help improve the efficiency of food production, accelerate the path to zero carbon, and reduce emissions - ensuring animal health, robustness and welfare.

The hub aims to develop world-leading research capability in data science; address skills shortages and gaps in the industry and encourage graduates to set up or join micro-agritech companies. It brings together researchers from the University of Edinburgh and other higher education institutions, along with commercial, public and third sector organisations, in collaboration with project partners Midlothian Council.

Nucleated at the **Royal (Dick) School of Veterinary Studies'** Easter Bush Campus – Europe's largest concentration of animal science research expertise - the hub is a dynamic and vibrant innovation environment. World-class facilities equipped with the latest technologies support Europe's largest concentration of animal science research experts and clinicians, as well as co-located industrial partners in our custom-built Innovation Centre. The hub therefore fosters collaboration between researchers and companies to contribute to global food systems, work towards net zero carbon in the Agritech sector, and inform food and environmental policies.

Experts in the hub will use data to develop genetics and health innovations for agricultural science and business, and to build initiatives and such novel systems of production as robotics. It will work in innovative areas, such as data-driven



Jo Churchill, Minister for Agri-Innovation and Climate Adaptation at the UK's Department for Environment, Food & Rural Affairs (Defra), visited the University of Edinburgh's Easter Bush Agritech Hub on 26 April.



4. The Deal – summary of progress

breeding and aquaculture, to enable data generation and analysis that will improve the agriculture industry worldwide. The investment will transform the scale and impact of agricultural technology in outputs from teaching, research, and innovation.

Headline achievements in the past year

Talent

- Successful Gateway Review of Agritech Talent Plan, with approval to progress with changes to deliverables based on feedback from a specialist marketing research agency.
- Public engagement activity with Easter Bush Science Outreach Centre **continues to soar**, with over 46,000 online engagements in the past year and further demand exceeding our expectations. Interactions include participation in citizen science projects such collating data for a **bee health study**.

Data

- Initial development workshops on data strategy and platform delivered, with further workshops on implementation plan to follow. Data-intensive projects supported in the past year include:
 - **Covid-19 dashboard tracks spread across Scotland**
 - **Data science applied to key food systems challenges**

Adoption

- The hub will continue to influence the Agritech public policy and promote collaborative interactions with both government, industry and the public. Key highlights include:
 - **Delivery of a Successful A3 Conference (Animal Health, Agritech and Aquaculture)**
 - **Participation in UK consultation on changing the DNA of farmed animals**

- **DEFRA minister visit to Easter Bush to discuss DDI and genetic technologies**
- **A hub expert joining sustainable livestock event at COP26**
- **Two new companies formed from FAST**, with both securing their first capital investments (**RhizocoreTechnologies Limited** and **Aquanzo**). Both companies have become tenants within the Roslin Innovation Centre.
- The **creation of Wobble Genomics** by a hub researcher (who also became a tenant within the Roslin Innovation Centre).
- Campus Innovation funding of £300k secured for a UK pilot project for Biotechnology and Biological Sciences Research Council (**BBSRC**) – looking to support and strengthen activity that facilitates industry-academic collaboration.

Research

- Agritech research continues to strengthen at Easter Bush. Key highlights include:
 - **Roslin's annual global impact approaching £20bn and National assessment highlighting research excellence**
 - **Retinal examination being identified as a predictor for heart attack risk**
 - **UK scientists joining forces to tackle bird flu**
 - **Global study identifying genetic differences associated with critical care Covid-19 patients**
 - **Multi-million-pound research programme aiming to tackle lung infections and future pandemics**
 - **£1.7M study aiming to produce lice-resistant salmon**
 - **Detection of signature inflammation marker which could aid early**



4. The Deal – summary of progress

- **detection of mastitis in cows**
- **Combining gene technologies with vaccination to eliminate specific livestock diseases**
- **Approach to tracking drug resistance in people and livestock receiving international recognition**
- **A simple, cost-effective technique of freezing reproductive cells to help secure food production in tropical countries**
- **hub lending expertise to UK study seeking to understand and improve immunity in older age**
- **Researchers aiming to pinpoint non-gene components in DNA linked to production and welfare traits in cattle, gaining insights across species**

Next milestones (2022/23)

Due Date	Milestone
Sep 22	Scotland to host conservation genetics conference: First meeting of its kind to be held in the UK and the hosts – the Royal Zoological Society of Scotland (RZSS), the University of Edinburgh and the Royal Botanic Garden Edinburgh (RBGE) – are recognised as global leaders in the fields of wildlife conservation and biodiversity research
Dec 22	Further evolve the long-term Data Strategy emerging from workshops, aim to undertake further workshops with EPCC in order to agree implementation plan for the next 5 years
Mar 23	Continue to strengthen and develop our Adoption activities to encourage a collaborative ecosystem within maximises opportunities for academics, government and industry. This includes completion of the Campus Innovation Account Pilot for BBSRC, seeking to establish a framework which support and strengthen activity that facilitates industry-academic collaboration
Mar 23 – Jul 23	Continue to strengthen leading-edge research capabilities with a wide array of data intensive projects, including securing strategic partnership investments with BBSRC for 23-28
Apr 23 – Jul 23	Following appointment of new Chair in Aquaculture, Establish a Centre for Aquaculture Genetics and Health, developing a business plan to enable a step change in the aquaculture genetics activity for the Agritech Hub Following appointment of new Quantitative Genetics Chair, establish a Centre for Data-Driven Breeding, developing a business plan to enable a step change in the genetic livestock breeding activity for the Agritech Hub Work with partners to develop Agri and Aqua accelerator schemes, to enable the next stage of company formation on campus
Jul 23	Further develop and scale up activities in line with approved Agritech Talent Plan and Easter Bush Science Outreach Centre delivery



4. The Deal – summary of progress

Edinburgh Futures Institute

The **Edinburgh Futures Institute** (EFI) is a major strategic initiative of the University of Edinburgh. EFI offers a new approach to research, education and innovative partnerships. Collaborating with industry, government and communities to build a challenge-led and data-rich portfolio of activity that has demonstrable ethical, social, cultural, economic and environmental impacts.

The Futures Institute is an opportunity for schools, students and staff across the University to do different things, explore innovative methods and create new types of partnerships through teaching, engagement and research.

An interconnected portfolio of MSc programmes and an innovative undergraduate programme, supporting interdisciplinary teaching, learning and research that will equip students with leadership, data and creative skills. Flexible and inclusive ways to learn both online and on campus promote opportunities for a diverse student body to apply knowledge to live projects and real challenges. Working in an environment that connects them to experiences and partners in community, industry, business and government. It aims to engage over 300,000 learners over the 15-year period of the City Region Deal.

A research culture that consolidates the University of Edinburgh's leadership in Data Driven Innovation Research and delivers impact through the generation of over £170 million in research income. The approach develops research capacity by retaining local talent and attracting global talent by supporting the incubation, growth and resilience of advanced interdisciplinary clusters and centres. We aim to extend and





4. The Deal – summary of progress

enhance the impact of our research by encouraging the widest use of our expertise and nurturing entrepreneurial thinking in our staff and students.

The co-location of civic and commercial partners attracted by the interdisciplinary, collaborative culture of EFI, offers a unique space to address social, environmental and economic challenges and realities. Edinburgh Futures Institute will host partners at different scale from four primary sectors: Financial Services (including Fintech), Creative Industries, Tourism and Festivals, and Public Services (including Data Civics) and these will be a key element in our co-creative work to deliver meaningful impact derived from our world-leading research. A further two cross-cutting themes underscore responsible knowledge exchange, innovation and enterprise with Future Infrastructures, and the Ethics of Data and Artificial Intelligence. All the work is underpinned by an urgent awareness of the climate crisis.

To support the skills development and collaborative potential of the Futures Institute, two complementary services have been designed to support the interconnected communities of students, staff and partners. The **Centre for Data, Culture & Society** provides a community of practice with space for experimentation, innovation and skills development, and gives tailored support to research groups and projects. The **Data+Design Lab** applies, curates and co-creates design methods to develop new projects and partnerships by forming constellations across experts, students, industry partners, and the wider community to offer unexpected perspectives on data-driven challenges.

This approach recognises that the biggest challenges facing societies globally

– including climate volatility, political discontent, economic upheaval and technological change – are complex and multi-level in orientation; and that insight and innovation can come from bringing the arts, humanities and the social sciences into contiguity with data science, engineering, the natural sciences and medicine.

Delivery of the Edinburgh Futures Institute is underway and the first substantial ‘horizon’ is the arrival of the first cohort of postgraduate students in September 2022. In Summer 2023 the building will be opened, and the first undergraduate cohort will be welcomed alongside an increasing pool of postgraduate students working with data across disciplines. As student numbers expand and the co-location of research centres, civic and commercial partners create an entrepreneurial campus – ultimately supporting the creation of at least 90 new companies – the Futures Institute will become a thriving, creative innovation hub.

Headline achievements in the past year

- October 2021: six new interdisciplinary, data-driven Masters programmes launched for recruitment. With its innovative ‘fusion’ model breaking barriers between online and on-campus, these programmes allow students greater choice in when and how they study and enable them to co-create their own learning. The first cohort of students will begin study in September 2022.
- April 2022: The **CreativeTech Scotland Gathering** showcased creative tech in Scotland, receiving strong positive feedback from industry, potential sponsors and Scottish Government.
- April 2022: it was announced that Edinburgh Futures Institute will host the new **Centre for Investing Innovation** on behalf of the University of Edinburgh, with



4. The Deal – summary of progress

- £7.5m funding from abrdn. EFI colleagues have worked closely with Bayes, EI and others to deliver on this major strategic partnership which will leverage excellent academic insight on the challenges and opportunities facing the company and the sector. It will also drive new understanding of investment-related social and environmental sustainability issues.
- May 2022: Professor Chris Speed, the Institute’s then-Director of Innovation, took over as Director of EFI when Professor Lesley McAra stepped down at the end of her four-year appointment.
 - June 2022: Announced that the **Edinburgh International Book Festival** will take place at the Futures Institute from 2024. This will give the Book Festival a variety of beautiful, accessible indoor and outdoor areas along with the facilities to stage a hybrid programme of livestreamed and in-person events. It will have ample space to create the atmospheric literary gathering place that audiences and authors have long valued, for socialising, making connections and sparking ideas.
 - June 2022: A **new undergraduate programme in Interdisciplinary Futures** was approved and will welcome its first cohort of students in September 2023.
 - July 2022: Edinburgh Futures Institute developed its Autumn 2022 season event programme which will deliver a collaborative and thematic season of events, both in person and hybrid, including the third Edinburgh Futures Conversation which will focus on Climate: Damage and Loss. The programme will launch in September 2022.

Next milestones (2022/23)

Due Date	Milestone
Sep 22	Welcome first cohort of postgraduate taught students to EFI
Oct 22	Launch second tranche of postgraduate programmes for recruitment
Dec 22	Deliver EFI’s first ‘season’ of hybrid, in-person and online events
Apr 23	Deliver annual EFI research awards to support innovative, interdisciplinary research
May 23	Deliver two further Edinburgh Futures Conversation events
Jul 23	Secure appropriate mix of tenants, partners and members within EFI preparatory to moving into the new building



4. The Deal – summary of progress

Edinburgh International Data Facility (EIDF)

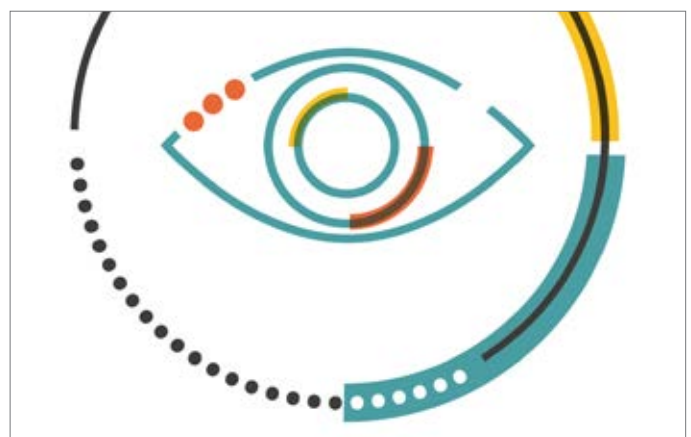
Achieving the aims of the DDI initiative requires a powerful, high-capacity and flexible data infrastructure capable of responsive and secure delivery of an expanding range of complex and bespoke data and analytical services. These activities also demand a level of service (e.g. resiliency to the loss of power, redundancy of equipment to mitigate the impact of sudden failures) that is not normally required for research computing applications and is not currently supported by existing facilities.

The **EIDF** consequently consists of four complementary components:

- EIDF computer room: a new high resiliency computer room at the Edinburgh Parallel Computer Centre’s Advanced Computing Facility to complement the other three computer rooms that are focussed on supercomputing system provision for research users;
- Data and software infrastructure: the underlying private cloud computing and data infrastructure to support the DDI initiative. As part of this component, both Open Source and paid-for advanced data analytics and other software infrastructure will be delivered;
- Internet of Things (IoT) service: a regional IoT network for the city region will be created. This part of EIDF is the responsibility of the University of Edinburgh’s Information Services Group; and
- Regional Data Haven: a regional data haven for local public data, sourced initially from City Region Deal partners, will be created to support a smart public data generation infrastructure.



Edinburgh International Data Facility





4. The Deal – summary of progress

Headline achievements in the past year

EIDF’s focus in 2021/22 shifted from infrastructure build to service delivery. Despite ongoing working disruption caused by the tail-end of the COVID-19 pandemic, progress has been good on both general-access services and project-based bespoke services for DDI partners and stakeholders. View EIDF’s **Service Catalogue**.

Date	Activities
Aug 21	The Cerebras CS-1 service, the first installed in Europe, is in use by University of Edinburgh researchers.
Sep 21	A new version of the University’s Data Safe Haven has been running successfully in pilot and will be expanded to support additional projects over the course of the year.
Nov 21	The Ultra2 large-memory service is in use by researchers, notably the ISARIC4C, PHOSP and GenoMICC covid-19 viral genomics consortia.
Nov 21	First version of the EIDF data catalogue launches in a dual role as the data catalogue for the Research Data Scotland (RDS) partnership formed this year between University of Edinburgh, Public Health Scotland and the Scottish Government (https://find.researchdata.scot). A detailed plan for further catalogue development is being agreed with RDS and the Scottish Safe Havens Network. There is an opportunity here to help data and service providers connect across Scotland.
Jun 22	Announcement of procurement for EIDF of two leading edge AI systems: an upgrade for the CS-1 to a CS-2, and the acquisition of a Graphcore Bow Pod system.
To Aug 22	<p>Throughout the year we have worked with a range of partners across the University and beyond using both new EIDF infrastructure and the older EIDF “interim service” environment.</p> <p>Services in production or pre-production:</p> <ul style="list-style-type: none"> • The Scottish National Safe Haven (NSH) has run business-as-usual, with federation services with other UK-based safe havens prototyped under the HDR-UK Data and Connectivity programme. • DataLoch (private Safe Haven analytics desktops, a DDI project with Usher) • Smart Data Foundry (formerly GOFCoE) (private Safe Haven analytics desktops) • Data SlipStream (a data management service for satellite data, a collaboration with Geosciences) • Scottish Government SPACe programme (both Safe Haven and standard analytics desktops) <p>Services in prototype or development:</p> <ul style="list-style-type: none"> • iCAIRD (an early adopter computing and data management service for digital pathology, a collaboration with the Industrial Centre for Artificial Intelligence Research in Digital Diagnostics) • National Records of Scotland Safe Haven (private Safe Haven analytics and data management) • National Collection of Aerial Photography (data hosting and research use)
IoT Service	
To Aug 22	As part of our SeNSES infrastructure work, we have developed, upgraded, redeployed and security reviewed our entire back-end data processing infrastructure including our TTN LoRaWAN network server; Elastic data storage, visualisation and analytics stack; and web portal back-end infrastructure. We have also been developing a new real-time data integration service end point for external applications based on the industry standard MQTT protocol.



4. The Deal – summary of progress

Next milestones (2022/23)

EIDF will continue its focus on a combination of generic service development and bespoke project support. Its operating model is to engage with stakeholders on DDI projects using existing EIDF services and infrastructure, identify commonality and synergies between projects and from these develop new generic services. This has worked well over the last year.

Due Date	Milestone
Ongoing	Continually improve EIDF compute and data management services. Support development of UoE information governance processes for UoE Data Safe Haven.
Aug 22	Launch service on the Nvidia A100 GPU cluster.
Oct 22	Upgrade Cerebras CS-1 service to CS-2. Complete design of “Outbreak Data Analysis Platform Trusted Research Environment” with HDR-UK, Public Health Scotland, Scottish Government and Roslin Institute through ODAP Partnership.
Jan 23	Launch general data ingest and archiving service. Complete redesign of “National Safe Haven 2.0” with Public Health Scotland, Scottish Government and ADR Scotland (Administrative Data Research Scotland) through Research Data Scotland. Complete ingest of COG-UK and NHS Digital data into ODAP TRE.
Apr 23	Launch hosted version of EDINA’s Noteable Jupyter Notebook service. Complete upgrade of overall Safe Haven Services hardware infrastructure.
Jul 23	Reinstate Scottish Medical Imaging service data updates from Scottish national Picture Archiving and Communications Systems (PACS) (in partnership with Public Health Scotland, Scottish Government). Launch general UoE Data Safe Haven service for researchers upon final agreement on University-wide IG processes. Complete design for new safe haven to support Edinburgh clinical trials unit. Launch first version of OpenCGA genomic data management and analytics service for Institute of Genetics and Cancer (with Cambridge-based Zetta Genomics). Launch first version of the Battery Data Hub, a data management and analytics service for battery data for the School of Maths and the UK Faraday Institute. Launch access to some initial IoT SeNSES datasets via the Noteable service. Complete migration of early DDI projects from interim service environment to the new EIDF production environment: <ul style="list-style-type: none"> • The Scottish Government SPACe analytics workbench service • The Scottish Government SPACe confidential workbench private safe haven • The Smart Data Foundry private safe haven • The DataLoch private safe haven • The iCAIRD digital pathology research service • The NCAP data processing and dissemination service • The Data Slipstream data processing and dissemination service • The Scottish Genome Partnership research service



4. The Deal – summary of progress

National Robotarium

The National Robotarium is a world-leading centre for Robotics and Artificial Intelligence. Its responsible and collaborative approach creates innovative solutions to global challenges. Its pioneering research moves rapidly from laboratory to market, developing highly skilled visionaries and delivering substantial benefits for society. Its ethos is People centred; Intelligence driven.

This research and development facility translates cutting-edge research into technologies to create disruptive innovation in an expanding global market in robotics and autonomous systems, delivering sustainable economic benefit to the city region, Scotland and the UK.

As global leaders in Robotics and Autonomous systems, Heriot-Watt University and the University of Edinburgh explore collaborative interaction between humans, robots and their environments at all levels. The National Robotarium will leverage existing research and the expertise of UK industry with the significant market opportunity of Robotics and autonomous systems. Building capacity across complementary areas of embedded intelligence and expert systems, the National Robotarium will link to other UK and international research locations to attract further inward investment.

The £22.4 million purpose-built centre, opening in August 2022, will have unrivalled facilities adding to our existing laboratories in Ocean Systems, Human Robotic Interaction and Assisted Living.

With a strong focus on entrepreneurship and job creation, the National Robotarium will offer an ecosystem for industry collaboration where humans and robots work in partnership.





4. The Deal – summary of progress

Headline achievements in the past year

- Construction completed in Summer 2022
- Two small businesses confirmed as moving in and four new SMEs identified
- First industry funded contracts received as National Robotarium Offshore renewable companies
- First research grants received
- **Orca programme** complete, with National Robotarium now continuing/expanding industrial relationships
- New academics recruited into National Robotarium specialist team covering areas such as Agritech, crop harvesting and vertical farming as well as specialists in autonomous systems
- First National Robotarium advisory groups established covering agriculture and the energy sector
- NHS Grampian partnership established, solution development maturing for hospital benefit
- National Robotarium leadership team now in place
- National Robotarium Engineers and Programme managers in recruited and in post

Next milestones (2022/23)

Due Date	Milestone
Sep 2022	National Robotarium fully operational and official launch
Sep 2022	First Tech companies in residency
Mar 2023	Secure 1-3 strategic enabling partnerships in order to accelerate National Robotarium capability

Strategic Added Value

The development of the National Robotarium is aligned with the strategic focus of both Universities and with the Data-driven innovation theme. The core strategic focus of Heriot-Watt University is:

- Strengthen research intensity in fields of economic and societal benefit;
- Provide truly global education while maintaining our Scottish roots; and
- Deliver excellent student experience and highly employable graduates.

The National Robotarium is actively identifying opportunities with colleagues across the DDI programme. These examples include:

- Collaborate with **Bayes Centre** to support activities in Robotics and Autonomous systems across the University of Edinburgh and Heriot-Watt University, driven by the academic expertise of the **Edinburgh Centre for Robotics**.
- Discussions underway around a partnership with **Edinburgh Futures Institute** to develop CPD and other talent offerings on ethics in robotics. The **UKRI Trustworthy Robotics programme** can be a foundation for collaboration.



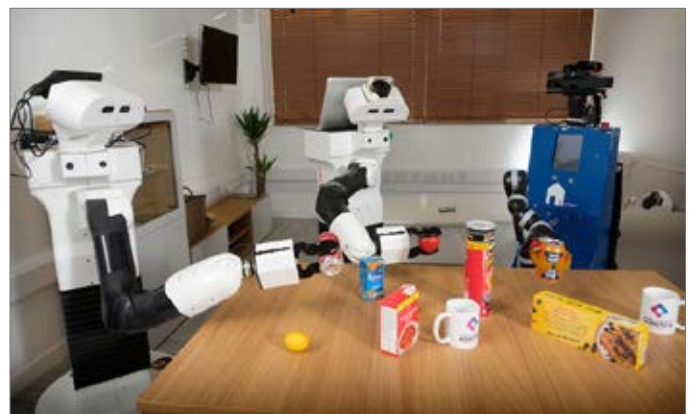
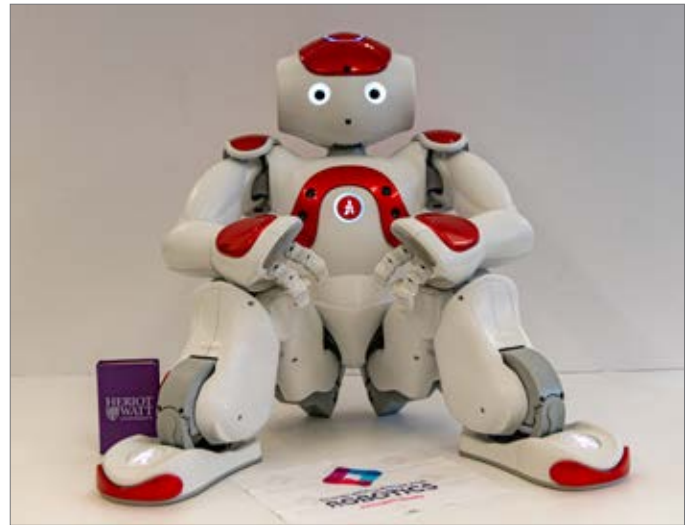
4. The Deal – summary of progress

During the procurement and completion of the National Robotarium main construction contract, there was a focus on the delivery of an ambitious Community Benefits plan with agreed KPIs on variety of areas including youth and school engagement, work placements and job creation within an inclusive growth approach.

Public Engagement is an integral part of our research practice at the National Robotarium. By actively embedding this into its work, the National Robotarium will enhance the skills and attitudes of all those taking part and ensure our research is socially conscious and relevant.

The vision is to create a sustainable programme of engagement focused on robotics and artificial intelligence, putting audiences at the heart of an offering through increased public understanding and critical appreciation of robotics and Artificial Intelligence (AI). The National Robotarium will be fully engaged in policy making on robotics and AI, from ethics to standards and public understanding. Some highlights include:

- Launch of Pilot Schools programme involving senior School students (S4-6) working with Primaries (P5-7) in West Lothian. The ambition is for a sustainable programme with a focus on the challenges of gender balance in STEM subjects and engagement with SIMD20 areas.
- Engagement with over 40 schools in the city region area as part of the **Name our Robot Dog** competition.





4. The Deal – summary of progress

Usher Institute

Through the application of data science, the **Usher Institute** is driving innovation in health and social care that improves lives. It will establish a world-leading innovation hub where public, private and third sectors can collaborate to enable data-driven advances in the delivery of health and social care.

The Usher Institute works with people, populations and their data to understand and advance the health of individuals and populations in the community and beyond. It supports the use of data and digital technologies to improve outcomes for patients and encourage the adoption of those with the greatest potential to transform health and social care.

The activity will deliver the infrastructure, resources, and expertise essential for the data-driven transformation of the health and social care sector in the City Region and beyond. This includes the creation of high-quality education and training in the application of data skills within health and care; a unique regional data service, **DataLoch**, as a foundation innovation asset; and a membership-based innovation community bringing together service, academic and industry interests to collaboratively develop solutions to our most pressing health and social care challenges.

Innovation and commercialisation will be embedded at the heart of Scotland's premier academic medicine campus with a new, bespoke home opening at **Edinburgh BioQuarter** in early 2024.



Usher Institute



A panel session at Digital Health and Care Scotland 2022, held on 23 February at Dynamic Earth on Ageing and Frailty. Pictured is Nick Mills closing the session, with a presentation on the Usher Institute and data-driven innovation activities.



Topping out ceremony for the new Usher Institute building attended by the Lord Provost.



4. The Deal – summary of progress

Headline achievements in the past year

Date	Activities
Sep 21	Launch of two new post-graduate programmes - MSc Data Science in Health and Social Care , and MSc Epidemiology with above target student numbers.
Sep 21	Seven Scottish Funding Council Beacon Projects delivered across secondary, primary and social care (£650k).
Dec 21	DARE UK Sprint Exemplar Award to DataLoch to enhance public engagement (£108k). Contribution to Data-Driven Entrepreneurship Programme cohort 1 output: <ul style="list-style-type: none"> • 72 applications; • 99 teams and individuals supported; • 13 incubator companies; • 2 accelerator participants
Mar 22	Undergraduate Challenger Event took place.
Apr 22	Gateway review of DataLoch and Talent led to increase in funding for more focus on public engagement and tooling; and Continuing Professional Development respectively.
Apr 22	Business plan for Usher Innovation approved.
Jun 22	Topping-out of the new Usher building at Edinburgh BioQuarter by the Lord Provost of Edinburgh, Councillor Robert Aldridge and Professor Sir Aziz Sheikh, Director of the Usher Institute.
Jun 22	Scottish Government award to run Digital Health and Care Transformation Leaders' Programme.
Jul 22	DataLoch full product launch incorporating advanced analytical platform open to application from researchers from any organisation.
Jul 22	73 data output projects delivered by DataLoch associated with £7.6m of research grant awards to the University.

Next milestones (2022/23)

Due Date	Milestone
Sep 22	Announcement of Usher Innovation Director
Oct 22	Launch of an Usher innovation community including first Innovation Challenge on Frailty
Jan 23	Launch of Digital Health and Care Transformation Leaders' Programme
Mar 23	Ingestion and linkage of first social care data into DataLoch
Jul 23	Usher building construction complete
Jul 23	Development of BMedSci - Data Science for Healthcare intercalated honours programme for the MBChB course



4. The Deal – summary of progress

Edinburgh Innovation Hub

East Lothian Council and Queen Margaret University are delivering, in partnership, the Edinburgh Innovation Hub. The Edinburgh Innovation Hub (“Hub”) is in a prime strategic location next to the QMU campus on East Lothian Council owned land and is a catalyst for the subsequent development of a wider Edinburgh Innovation Park (“EIP”).

The state-of-the-art Hub is a flexible 7,200 sqm GIA for the food and drink sector in Scotland, located directly adjacent to, and supported by Queen Margaret University – a university that is leading on international research in Dietetics, Nutrition and Biological Sciences.

The Hub will drive company growth, supporting and developing existing businesses and creating sustainable new businesses to access a global market for healthy and functional food. The development will allow Queen Margaret University, along with businesses, to form and grow a business sector that will harness the potential of translational medicine in food and drink and contribute to the wider health agenda. This will in turn support the diversification of the food and drink industry towards preventative, therapeutic and rehabilitative applications of expertise in genomics of food and drink sector. The EIP will be developed over time and create a nationally significant centre of knowledge exchange, innovation and high value business growth.



Edinburgh Innovation Park Masterplan



The EIP is also part of a significant development of land adjacent to the Queen Margaret University campus, which encompasses a new grade separated junction, 1,500 homes, a new primary school and community facilities. There will also be the creation of a commercial zone within the existing Queen Margaret University campus that will enhance the University’s support and enablement of the wider development zone and its community.

Headline achievements in the past year

Date	Activities
January 2022	Commencement of the Junction Works
April 2022	Completion of the Joint Venture structure between ELC and QMU
May 2022	Appointment of the Design Team
June 2022	Approval from the ESESCRD Joint Committee of the reinvestment of the recovered VAT monies into the Project



4. The Deal – summary of progress

Next milestones (2022/23)

Due Date	Milestone
Jul 2022	Procurement of Contractor commences
Nov 2022	RIBA Stage 3 – Finalised design of the Edinburgh Innovation Hub
Jan2023	Completion of construction of the Junction Works
June 2023	Appointment of the Contractor
July 2023	Commencement of construction of the Hub

Strategic Added Value

- The Hub forms a key part of an ecosystem of Innovation themed projects promoted by the Edinburgh South East Scotland City Region Deal.
- Collaboration across the Higher Education and Further Education network within the Edinburgh South East Scotland City Region Deal is ongoing. QMU is, for example, through its existing collaborative partnership with Edinburgh Napier University assessing the opportunity for Edinburgh Napier University to contribute to the EIP development in terms of supporting Innovation support for SMES additional to or supplementary to the QMU service offering.
- QMU continues to liaise with other Scottish City Region Deals that have Innovation/ Food & Drink focussed activity to ensure alignment and collaboration in the national context.
- Proposals for a Women’s Business Centre are being developed. Capital City Partnership have supported a research exercise on this and QMU are working with the Women’s Enterprise Service to develop a brief for a Women’s Business Centre with the intention that this will be trialled within the existing University Campus prior to locating within the Hub.
- The Hub will generate job opportunities in the sector for those highly skilled graduates both through the innovation led growth of the businesses located there, and through providing access to the space, facilities and services for food and drink graduate start-up companies.
- The wider project will contribute to job density improvement for the wider city region by making available infrastructure/ construction opportunities and employment opportunities within the Hub and the EIP.
- The approval in June 2022 to reinvest the reclaimed VAT monies into the projects provides an opportunity for the Joint Venture to deliver further positive impacts that can be summarised as:-
 - 1 Enhance the project outcomes through targeted additionality in the design and specification to further the value proposition to end users.
 - 2 Extend projects performance on sustainability and Net Zero Carbon.
 - 3 Contain impact of construction cost inflation.
- Linking in with the Capital City Partnership to capture through the procurement process a range of community benefits.



4. The Deal – summary of progress

Fife Industrial Investment Innovation

The Fife Industrial Innovation Investment (i3) Programme is a £50 million, ten-year programme delivered by Fife Council.

The investment will deliver new business premises and immediately available serviced land. The new business accommodation will be located within existing business clusters in mid and south Fife, adjacent to growth corridors (M90 and A92). It will facilitate more joint working between the region's universities and Fife businesses, drive productivity and deliver higher value, skilled, permanent jobs from data driven innovation.

The new industrial and commercial stock will ensure that Fife's industrial estates provide flexible space for innovative manufacturing industries with cutting-edge digital and energy capabilities. Five sites have been developed in Glenrothes, Kirkcaldy, Dalgety Bay, Lochgelly and Dunfermline during the first three years of the Programme. 5.4 Ha of immediately available employment land is now ready for private sector investment, along with almost 1,900 m² of newly developed business space. These new units are more than 90% occupied.

Headline achievements in the past year

- Completion of seven new business units at **Dunnikier Business Park**, Kirkcaldy.
- Phase 1, Site Servicing contract complete at Lochgelly.
- Construction Project underway at Hillend & Donibristle Industrial Estate, Dalgety Bay scheduled for completion in September 2022.
- Business Units at Queensway, Glenrothes are **fully let**.
- Implementation of Tranche 2 of the Fife i3 Programme is underway.



Fife Industrial Investment Innovation





4. The Deal – summary of progress

Next milestones (2022/23)

Due Date	Milestone
Sep 2022	Completion of Business Units at Hillend & Donibristle Industrial Estate, Dalgety Bay
Dec 2022	Fife Interchange North Site Servicing Project Complete
Q3 2022	Fife Interchange North Business Units start on site
Q3 2022	Lochgelly Site Servicing Initial Ground works complete
Q3 2022	Survey of tenants to take place
Aug 2023	Site Acquisition complete of site 3 at Hillend & Donibristle Industrial Estate

Strategic Added Value

The Fife i3 Programme works closely with the Borders Innovation Park Project to share “lessons learned” and has also engaged with the Data-Driven Innovation Programme around Innovation opportunities. It is envisaged that these linkages will continue to strengthen as the Programme moves from construction activities into support to tenants.

Fife Council’s strategic inclusive growth priority is the Mid-Fife Area. All projects in the Fife i3 Programme are considered within the context of their contribution to inclusive growth and the locations for investment have been selected based on criteria that include:

- Ability to support strategic business clusters;
- Location / connectivity to strategic growth corridors (M90, A92);
- Fit with existing predominant land use;
- Potential impact on sensitive or incompatible land uses; and
- Potential to deliver lower-cost business space.

In addition, when the Programme was reviewed in preparation for Tranche 2, four additional criteria relating to sustainability and net zero were added to the site selection process:

- Greenfield – greenfield sites are generally not preferred unless they fulfil other sustainability criteria or make a significant contribution to other strategic objectives.
- Passivehaus – can the site accommodate a passivehaus design, particularly in relation to the orientation of the building to maximise passive solar gain?
- Renewables – does the site have access to any renewable energy source (e.g. district heat network, air source or solar power)?
- Vacant & Derelict Land – will the project remediate vacant and derelict land or property?

Work continues to develop and refine the Programme’s approach to sustainable construction.



4. The Deal – summary of progress

Borders Innovation Park

The Borders Innovation Park, situated next to the Borders Railway terminus at Tweedbank, will deliver much-needed high quality business space to the Scottish Borders. Costing £29 million and being constructed in three phases, the programme will stimulate business growth and associated job creation. As with many other rural economies, the Scottish Borders has to overcome the problem of market failure caused by a combination of remote locations and poor infrastructure, a lack of supply of modern business premises and the increasing obsolescence of existing stock.

The Borders Innovation Park will greatly enhance the inward investment offer in the Scottish Borders, particularly to high-value sectors, as well as assisting existing businesses to improve their competitiveness. It will also help to address inequalities in the area through providing access to better quality, higher paid jobs.

Headline achievements in the past year

- **December 2021:** Completion of first building in Borders Innovation Park.
- **April 2022:** Submission of planning application for road and service infrastructure for Phase 3.



Borders Innovation Park





4. The Deal – summary of progress

Next milestones (2022/23)

Due Date	Milestone
Summer 2022	Approval of planning application for road and service infrastructure for Phase 3.
Summer 2022	Opening of first building.
Autumn 2022	Submission of revised Full Business Case for Phases 2 and 3.

Strategic Added Value

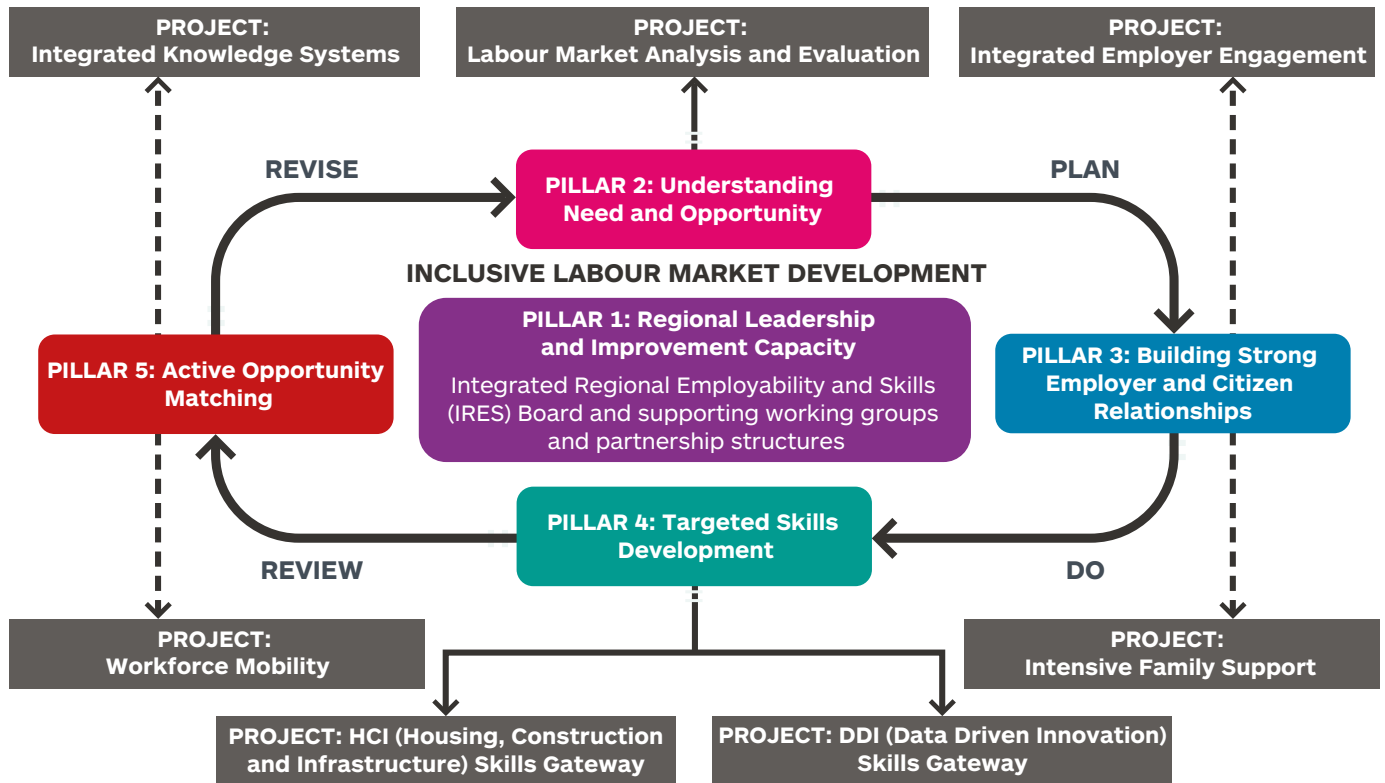
Scottish Borders Council is working with strategic partners, particularly Fife Council and the University of Edinburgh, to maximise the benefits of data-driven innovation and its potential to increase the number of innovation-active businesses, both regionally and locally. It is also working with South of Scotland Enterprise to maximise the business support and advice available to businesses. As a participant in the City Region Deal Housing, Construction and Infrastructure (HCI) Skills Gateway, the Council will look to develop new talent through utilising the construction opportunities during the build phases of the innovation park.



4. The Deal – summary of progress

Integrated Regional Employability and Skills

The Integrated Regional Employability and Skills (IRES) Programme and its cross-sector partnership seeks to evolve regional labour market policy and practice to help drive inclusive growth. The programme continues to focus on five improvement pillars targeting known areas of weakness or opportunity.



The IRES partnership is funded by £25 million investment (over eight years) and will deliver an additional 14,700 skill improvements; 5,300 people into employment; and a further 500 career enhancements through its seven themes:

1. Integrated knowledge management systems
2. Labour market analysis and evaluation
3. Integrated employer engagement
4. Intensive family support service
5. Housing construction and infrastructure (HCI) targeted skills gateway
6. Data-driven innovation (DDI) targeted skills gateway
7. Workforce mobility



4. The Deal – summary of progress

The COVID-19 pandemic is having far reaching economic repercussions with many instances of increased unemployment and reduced recruitment across many sectors, creating a lack of opportunities. At the same time, health care and hospitality have seen high demand with a shortfall of available labour as individuals have moved into different sectors. This has reaffirmed our mission to upskill and reskill, assisting residents into employment, and to access higher skilled and higher paid jobs.

The IRES programme has already supported 18,062 people to improve their skills through training and/or education, helped 620 people into work and secured an additional £4.3m funding to enhance IRES activity. The IRES programme continues to evolve, streamline, and integrate the region's employability and skills system to enhance our capacity and capability to drive inclusive growth and create added value for stakeholders.



4. The Deal – summary of progress

Headline achievements in the past year

1 Integrated Knowledge Systems (IKS)

- Migration of City of Edinburgh and East Lothian Councils employability delivery to new Helix system as well as Intensive Family Support Service delivery across all local authorities in the City Region Deal area
- City of Edinburgh Council data went live and they are now using Helix for School Work Experience
- Creation of a collaboration agreement to be signed by all six Local Authorities to cover the long term, mainstream funding of Helix



2 Labour Market Analysis & Evaluation (LMAE)

- Delivery of green skills report and effective dissemination across the regional partnership
- **Labour Market Toolkit** for frontline workers updated with a digital skills spotlight section
- LMAE research plan reviewed and refreshed to ensure it reflects any changes in economy and partner's needs. Approved by LMAE Theme Group and IRES board. Upcoming research in 2022/23 will consider future skills needs in the Tourism sector and the Creative sectors.



3 Integrated Employer Engagement (IEE)

- IEE launched the **ESESCommunities** portal in November 2021, engaging with suppliers of public contracts across the region to encourage responses to local community needs and requests. This portal offers a voice and platform to community causes, charities and third sector organisations and encourages the delivery of innovative community benefits across the region as explained in **this video**. Community benefits remain at the core of activity and an example can be seen through the collaboration with The National Robotarium **The National Robotarium on Vimeo**





4. The Deal – summary of progress

Headline achievements in the past year

- 3** • Under the Recruitment and Skills Centre workstream, the Fort Kinnaird Recruitment Skills Centre delivered a second year of the Retail Rapid Response project which supported 466 residents of Edinburgh, Midlothian and East Lothian. 103 people secured employment and 235 attended training courses and/or recruitment information sessions. 76 employers were supported with recruitment, staff support and redundancy advice. Other programmes were also delivered through this workstream including the transferable skills academy **IEE Transferable Skills Academy - YouTube**
 - A sectoral awareness campaign ‘**Proud to Care**’ was launched in February 2022. This campaign included the development of an **8-minute docu-film** showcasing the positives and realities of working in the Health and Social Care sector, a suite of short stories on individuals employed across the industry and a 30 second television advert. This campaign ran from February to April 2022 and was accessed by over 675,000 citizens and was designed to encourage individuals to consider a career in this sector in response to the current recruitment crisis and staff shortages.

- Links to individual's stories:
Kelly's Story
Megan's story
Gillian's story

4 Intensive Family Support Service (IFSS)

- The Intensive Family Support Service has engaged with 274 individuals (214 adults, 60 young people) across the City Region, delivering a combination of Family Support Work, Advice and Income Maximisation and Employment support
- Phase One evaluation complete encapsulating the first two years delivery, produced by University of Edinburgh. This focussed on individual services, as well as the overall programme, identifying common themes, best practices, and innovative intervention including recommendations to inform Phase Two of the programme
- The service has expanded into five early years centres in Edinburgh due to funding secured through positive impacts and outcomes experienced by families who have engaged across the region





4. The Deal – summary of progress

Headline achievements in the past year

5 Housing, Construction, and Infrastructure (HCI) Skills Gateway

- Watch a **short film** giving an overview of the HCI Skills Gateway Programme
- Showcased human habitats imagined by 191 primary and secondary pupils, plus 61 college and university students, in partnership with LEGO, Daydream Believers and Ellen McArthur Foundation at COP26 in Glasgow in November 2021
- Celebrated the graduation in October 2021 of the first cohort of eight female Construction Innovation scholars; seven of whom are now working in housing and construction roles within the City Deal Region
- Leveraged an additional six-figure investment into the HCI-piloted Timber Technology, Engineering & Design (Timber TED) learning pathway, to establish the world's foremost timber knowledge library in advance of launching the qualification nationally from September 2022 onwards



6 Data-Driven Innovation (DDI) Skills Gateway

- Watch a **short film** giving an overview of the HCI Skills Gateway Programme
- Shortlisted for Digital Leaders award for Talent Initiative of the year
- Delivered several Day of Data events at West Lothian and Scottish Borders Colleges engaging school pupils and teachers in a range of data-based workshops
- Awarded £82,000 of Data Skills Credits in year three benefitting 264 learners



7 Workforce Mobility (WFM)

- Involved in the delivery of the Regional Prosperity Framework and Delivery Plan (Transport theme)
- Supported the delivery of a Demand Responsive Transport Trial in the Scottish Borders
- Worked with SEStran to draft text for the new Regional Transport Strategy to reflect Workforce Mobility issues and opportunities





4. The Deal – summary of progress

Next milestones (2022/23)

Due Date	Milestone
Oct 2022	<p>Integrated Knowledge Systems (IKS)</p> <ul style="list-style-type: none"> • Cleanse and migrate all data IEE including C-19, Fort Kinnaird, Community Wealth Building, Employer Fund etc. into Helix to sit alongside employability delivery • Migrate Scottish Borders Council into Helix using single common reporting language & migrate Midlothian Council using additional functionality to allow CLD reporting • Launch Helix.scot website
Jan 2023	<p>Labour Market Analysis & Evaluation (LMAE)</p> <ul style="list-style-type: none"> • Delivery of regional analysis of future skills needs for the tourism sector • Delivery of regional analysis of future skills needs for the creative industries sector • Complete review of Labour Market Toolkit, including recommendations for future development
Mar 2023	<p>Integrated Employer Engagement (IEE)</p> <ul style="list-style-type: none"> • Support project teams within Queen Margaret University, East Lothian Council and Currie & Brown, to design the community benefit commitments for the Edinburgh Food and Drink Innovation Hub whilst embedding Community Wealth Building practices to inform the production of the CLES recommendations paper • Following the purchase of the FLOW online training tool, 60 learner accounts will be offered to small businesses in each of the 6 local authority areas (10 per area) to support businesses to upskill employees through a series of accredited courses • A sectoral awareness campaign will be launched to encourage employers to support ‘green jobs’ across their workforce and practices. This will include a social media campaign aimed to encourage those working within the region to adjust their career aspirations in line with the green agenda
Jan 2023	<p>Intensive Family Support Service (IFSS)</p> <ul style="list-style-type: none"> • As we near the end of Phase One delivery, a period of consultation is underway with service delivery partners, stakeholders and families across the City Region. Once completed, this will inform Phase Two service delivery in each local authority area across the region • Planning for a network event is underway to share learning and innovative approaches of delivery partners from Phase One • Phase One of the Intensive Family Support Service will come to an end in December 2022 and will move into Phase Two from January 2023
Aug 2023	<p>Housing, Construction, and Infrastructure (HCI) Skills Gateway</p> <ul style="list-style-type: none"> • Deploy three new learning pathways piloted by HCI – Timber TED, Equal Engineers and Build for Good - as national programmes, upskilling 200 people working in construction within the region • Exceed overall target of 400 young people from SIMD20 backgrounds engaging in introductions to modern construction careers through partnerships with SCDI, Daydream Believers and Edinburgh Science Festival • Reach 33% of overall target of 5,000 students for net zero skills short courses delivered by Scottish Borders, Edinburgh, Fife & West Lothian Colleges



4. The Deal – summary of progress

Next milestones (2022/23)

Due Date	Milestone
Mar 2023	<p>Data-Driven Innovation (DDI) Skills Gateway</p> <ul style="list-style-type: none"> • Complete roll-out of Internet of Things (IoT) network across the region’s schools and engage with networks of teachers in a range of data-related upskilling activities • Engage with third sector partners to deliver targeted data upskilling to under-represented groups • Extend embedding of data skills into new curricula areas across the region’s college and universities
Mar 2023	<p>Workforce Mobility (WFM)</p> <ul style="list-style-type: none"> • Delivery Bus Network Review for the Scottish Borders • Commence Data based transport projects in a least to other Local Authority Areas • Support the development of UK Levelling Up and Shared Prosperity Fund bids

Strategic Added Value

Inclusive growth remains at the centre of the IRES Programme with the aim of supporting long term sustainable destinations for those who live and work within the ESES region. By supporting local and regional ambition the IRES project has contributed to national policy to help shape future investment for the region. As the partnership supporting IRES develops, further opportunities for wider alignment have developed, including:

- Delivery of clear, integrated and inclusive pathways into industry
- Driving cross cutting themes within regional networks such as Community Wealth Building
- Ongoing research to tackle climate emergency, green skills, and skills gaps
- Engagement with stakeholders to support regional agendas including the development of the Regional Prosperity Framework
- Informing future policy through ongoing engagement with stakeholders



4. The Deal – summary of progress

A720 (Sheriffhall Roundabout)

The Sheriffhall Roundabout is currently the only junction on the A720 Edinburgh City Bypass that is not grade separated, which means the City Bypass is at the same level as the A7 and A6106 local approach roads. This at-grade, six-way junction, often experiences significant queuing, especially during peak hours. The Scottish Government's commitment through the Edinburgh and South East Scotland City Region Deal includes £120 million to support improvements to the A720 Edinburgh City Bypass for the **grade separation of Sheriffhall Roundabout**. The project is being delivered by Transport Scotland and is subject to Transport Scotland's normal governance procedures.

Headline achievements in the past year

- Continued engagement with the City Region Deal partners, on progress and technical scheme developments
- Formal responses issued to all objections made to the draft Orders and Environmental Statement
- Request lodged with the DPEA to initiate arrangements for a Public Local Inquiry (PLI) to be held and a Reporter has been appointed.



Visualisation of the proposed Scheme looking from the South-West



Visualisation of the non-motorised user facilities included in the proposed Scheme



Visualisation of the non-motorised user facilities included in the proposed Scheme



4. The Deal – summary of progress

Next milestones (2022/23)

Due Date	Milestone
Late-2022	Public Local Inquiry (PLI) to be held, potentially late-2022 but timescales to be confirmed
TBC	Delivery of the proposed Scheme can only commence if the proposed Scheme is approved under the statutory procedures. Only following completion of statutory consents can a programme be set for delivery of the proposed Scheme.

Strategic Added Value

The project will:

- Address the bottleneck on the strategic road network by improving operating conditions and connectivity at Sheriffhall and help to reduce the traffic impact of proposed developments on the area.
- Provide high quality active travel facilities to deliver a step change in accessibility for walking and cycling.
- Support future development in the region, including the South East Wedge development, inclusive growth and the removal of physical barriers to growth through delivery of programme of construction across the region.
- Contribute towards the requirement to provide Community Benefits in line with the requirements of the Procurement Reform (Scotland) Act 2014.
- Support wider skills development in the construction sector.



4. The Deal – summary of progress

West Edinburgh Transport Improvement Programme (Wetip)

West Edinburgh is recognised by the Scottish Government as a key national economic asset and perhaps the most important gateway to Scotland. National Planning Policy set the long-term vision for development and investment across Scotland and cites West Edinburgh as a significant business investment location with potential to be internationally competitive. In recognition of its key gateway function Edinburgh Airport and the scale of adjoining land identified as development.

The vision for West Edinburgh and the unlocking of the proposed business and residential development cannot be delivered without investment in an integrated package of transport intervention measures.

These include a core package of A8/A89 sustainable transportation measures that provide long term resilience and support strong connectivity between neighbouring authorities.

The interventions of transport infrastructure are centred around sustainable transport enhancements along the A8/A89 corridor between Broxburn and Maybury and are necessary to mitigate the impacts of new developments and meet the agreed modal share targets.

This proposal is in line with the City Region Deal vision which looks to accelerate the rate of investment and economic performance by capitalising on our existing world class assets through an inclusive and sustainable growth model.





4. The Deal – summary of progress

Next milestones

Due Date	Milestone
Jul/Aug 2022	Close out of Stage 1a and subsequent commencement of Stage 1b - Stage 1b appraises the remaining 4 parts of the Outline Business Case. It also delivers a Detailed Options Appraisal and Preliminary Design of Interventions. Stage 1b also includes more substantial stakeholder engagement and a public consultation exercise.
Sep 2022	Appointment of additional resources, (including a full time Project Manager) to coincide with finalisation of the Outline Business Case and more resource intensive project stages to follow, which include: statutory consents; procurement; and construction.
Mar 2023	Stage 1b finalise Outline Business Case
Sep 2023	Report Outline Business Case to City Region Deal Joint Committee
Oct 2023	Commence Stage 2 which includes: Detailed design of projects; site investigations; and attainment of necessary statutory powers in order to implement improvements and Procurement of Contractors.
Q1 2025	Infrastructure Construction commences

Strategic Added Value

The purpose of the West Edinburgh Transport Improvement Programme is to progress the delivery of the public transport and active travel measures identified in the 2016 WETA Refresh study including the assessment of the feasibility and demand for a new Park & Ride site at Kilpunt, on the A89 near Broxburn.

Interventions are being appraised against a wide range of objectives including, but not limited to, the promotion of sustainable travel to a range of destinations; improving regional connectivity and accessibility for all to jobs, education, healthcare and leisure; and delivering a combined active travel and public transport mode share of 50% within West Edinburgh to support net zero carbon emission targets.

The Programme brings together a range of stakeholders contributing to successful delivery. These include the City of Edinburgh Council, West Lothian Council, Bus Operators, Transport Scotland, Active Travel Groups, Bus User Forums, SEStran, Sustrans, Network Rail, Edinburgh Airport, Major Developers and other statutory consultees.

In due course, this project will be procured as a construction project, and links with the Housing and Construction Infrastructure Skills Gateway will be established. The improvement of public transport provision in this area has the potential to unlock housing development opportunities and ease congestion in the corridor between West Lothian and Edinburgh.



4. The Deal – summary of progress

Dunard Centre

Edinburgh has an international cultural reputation, attracting artists and audiences from around the world. But it is over 100 years since it last opened a purpose-built music venue, and with cities around the world investing heavily in cultural infrastructure, adding 21st Century facilities to the region's existing venue infrastructure is essential to maintaining and enhancing Edinburgh's status as a world class cultural capital.

The good news is that the plans are in place. A specialist team led by award winning David Chipperfield Architects, working with Reiach and Hall and Nagata Acoustics, is developing the **Dunard Centre**, a hall to rival any in the world for design, intimacy and clarity of sound.

With seating for 1,000 people and fully equipped with digital and broadcast facilities, Dunard Centre will be a transformational new home for Scottish Chamber Orchestra and an iconic venue for Edinburgh International Festival. It will be a welcoming space for all, catering for every style of music, from rock and pop to classical, choral, folk and world and hosting extensive education and outreach activities, connecting artists and audiences in new and exciting ways.

Dunard Centre will sit in Edinburgh's St Andrew Square, in the centre of the New Town, ideally placed to take maximum advantage of the public transport system. It will contribute to the opening up of the East End of the City complementing the reinvigorated commercial developments of the Square, St James Quarter and Register Lanes.



Dunard Centre from St Andrew Square



Dunard Centre northern approach Dunard Centre cafe terrace
Image: David Chipperfield Architects and Hayes Davidson



Dunard Centre auditorium
Image: David Chipperfield Architects and Hayes Davidson



4. The Deal – summary of progress

Dunard Centre will build on Edinburgh’s glorious musical past to create a new home for music in the future. Its development will change Edinburgh’s musical landscape, catapulting our capacity to host the best performers in the world into a different league. It will change how the city presents, curates and develops music for generations to come.

Headline achievements in the past year

Over the course of the past year, **IMPACT Scotland**, the charity established to develop and then operate the new hall, has continued to oversee the development of the design for the venue, focused on the core vision and mission of delivering a concert hall which offers world class acoustics and a world class audience experience. The scheme received planning consent in November 2021.

Milestones achieved (2021/22)

- RIBA stage 3 was approved by Trustees in July 2021
- Design was submitted for planning determination in August 2021
- The scheme received planning consent in November 2021
- Stage 4 Design commenced in January 2022
- The Business Case was **approved by the City Region Deal Joint Committee** in March 2022
- Commencement of pre-construction services agreement began in April 2022

Next milestones (2022/23)

Due Date	Milestone
Jun 2022	Delivery of RBS Enabling works
Jul 2022	Commencement of the Annex building site clearance and demolition works
2023	Main construction starts
End 2026	Construction ends

Strategic Added Value

Dunard Centre will rival the best in Europe for acoustics and audience experience, enhancing Edinburgh’s international cultural reputation, offering new opportunities for audience engagement and inclusive growth and providing a new platform for Scottish, UK and international artists. It will host a wide range of musical performance from orchestral to jazz, contemporary and folk as well as being a significant base for education, learning and outreach programmes and a welcome addition to the Edinburgh conference market.

Through the delivery of a wide ranging educational and community programme the Centre will develop opportunities - with a range of City Deal and other partners - to involve those socio-economic groups currently under-represented as participants and (in) audiences. A pre-opening creative programme of events and activities will lay the groundwork for these partnerships.

Dunard Centre is being designed to offer the highest standards of accessibility and sustainability, with a target of delivering a carbon net zero building by 2035 or earlier.



4. The Deal – summary of progress

The **Regional Housing Programme**, aims to accelerate the delivery of affordable housing and housing across all tenures, enable the development of seven major strategic housing sites and drive efficiencies across the public sector estate. Two strategic objectives were identified for the Regional Housing Programme:

- Deliver a step change in innovation and inclusive growth in the housing and construction sectors; and
- Deliver a step change in the supply of new homes across the South East of Scotland

Regional partners collaborate, share best practices and lessons learned on strategic sites, infrastructure, affordable housing delivery, innovation, and skills.



© Aerial Photography Solutions

Across the seven strategic sites (Blindwells, Calderwood, Dunfermline, Edinburgh’s Waterfront, Shawfair, Tweedbank and Winchburgh) a total of 156 social and 653 market homes have been completed over the last year, with 3,121 social, 281 midmarket rent and 8,897 homes approved for delivery. A breakdown is provided below:

Delivery (completions)	Tenure Mix			
	Social Rent	MMR	BTR	Market
Blindwells	80			115
Calderwood	18			144
Dunfermline	0			163
Granton Waterfront	0			0
Shawfair	38			63
Tweedbank	0			0
Winchburgh	20			168
Total	156			653

Delivery (approvals)	Tenure Mix			
	Social Rent	MMR	BTR	Market
Blindwells	480			1,120
Calderwood	34	22		150
Dunfermline	1,271			3,814
Granton Waterfront	334	259		12
Shawfair	1,002			3,651
Tweedbank	0			0
Winchburgh	0			150
Total	3,121	259	0	8,897

Please note that this breakdown does not capture the scale of design, development and enabling activity that has been delivered over the last year which will unlock significant construction activity in future years. The Headline Achievements below captures some of this detail and the Next Milestones section demonstrating the scale and breadth of activity that will take place over the next year.



4. The Deal – summary of progress

Headline achievements in the past year

- The Housing Need and Demand (HNDA) 3 assessment is complete and has been submitted to the Centre for Housing Market Analysis (CHMA) at Scottish Government and received Robust and Credible status on 28 July 2022
- The business case for the Dunfermline Strategic Site was developed by Fife Council in collaboration with Scottish Government and Scottish Futures Trust. The case for strategic transport infrastructure interventions to unlock housing delivery was **approved** at the 4 June 2021 ESESCRD Joint Committee meeting with funding for phase 1 drawn down in spring 2022.
- Completion and approval of Granton Waterfront Outline Business case. This was approved by the Council's Policy and Sustainability committee on 5 October 2021 and agrees to undertake stage 3 activities, to produce a Full Business Case for Phase 1 'Heart of Granton', which includes procurement of a development partner and progression of the business case stages for a low carbon district heat network.
- Construction on 75 net zero homes began in Granton Waterfront began in June 2022. This is the first pilot development in the **Edinburgh Home Demonstrator (EHD) Project**. The collaboration between local and national government, academia and the construction industry is testing a new model for designing, procuring and delivering new homes in the region to create a greener future.
- Ongoing completion of consented development in Blindwells Area 1, with detailed approvals for second phase infrastructure and on-going commercial and residential development phases within that area in place
- Between April and August of this year Winchburgh has seen the commencement of motorway junction; completion and opening of the non-denominational secondary school.
- In Spring 2022 a Board was established to oversee delivery of housing, supported living and elderly care facilities at Tweedbank
- At Shawfair Park the David Lloyd health and leisure club has now received consent and remains on target for a site and start in Autumn 2022. The Danfoss Low Carbon facility has now commenced on site with anticipated completion in Summer 2022.
- Edinburgh Living has drawn down all of the one off grant of £16.1m. 350 of the 728 mid-market rent homes have been delivered already with around 170 more homes expected to complete in 2022/23 with the remaining homes in design/development.



4. The Deal – summary of progress

Next milestones (2022/23)

Include milestones here that are expected to take place between September 2022 and August 2023. You can take this from the implementation plan.

Due Date	Milestone
End 2022/ early 23	Updated Regional Affordable Housing Programme will be produced when Scottish Government Affordable Housing Supply Programme Outturn Report is published (estimated autumn 2022).
2022/23	Continue to deliver the ESESCR Home Demonstrator Project pilot 1 and develop regional pipeline drawn from across the region
Aug 2022	Shawfair - Signing of Energy Services Agreement between Midlothian Energy Ltd and Shawfair LLP. This will allow creation of District Heating Network for provision of hot water and heating for domestic use from the Energy from Waste facility at Millerhill. This low carbon energy solution will be in place by 2023. Shawfair (Whitehills) - Following a successful planning application to expand permitted use classes strong market interest is being progressed from the Motor Trade, Trade Counter and General Industrial users. Shawfair LLP hope to bring the first of these with a detailed Planning application later in 2022.
Aug 2022	Granton Waterfront - Appointment of development partner to commence 18-month pre-development period for phase 1 'Heart of Granton'. Granton Waterfront - Appointment of consultant team to develop business case stages for low carbon heat network solution to serve new development and existing anchor loads.
Autumn 2022	Tweedbank - Approval of planning application for road and service infrastructure.
Summer 2022	Shawfair - Completion of RP08 connection from The Wisp to Millerhill Road
Autumn/Winter 2022	Shawfair - Installation of SuDS Basin (Danderhall North)
Dec 2022	Dunfermline - Planning application to be submitted for new bridge at Halbeath (first major element of the new Northern Link Road).
Dec 2022	Calderwood - Agreement on Phase 1 Park & Ride delivery expected and agreement on the third stream of primary education expected
Dec 2022	Shawfair - Agreement on provision of all through campus in Shawfair Town Centre.
Dec 22 / early 23	Blindwells – Draft Strategic Business Case
Jan 2023	Granton Waterfront - Completion of outline business case stage for heat network solution.
Spring 2023	Shawfair - Completion of internal access road (RP11), formation of SuDS Basin and upgrades to Cairnie Burn, including flood mitigation measures
Summer 2023	Granton Waterfront - Following a 9-month pre-development period with an appointed development partner where designs will be progressed, commercial options will be explored and funding secured to enable a viable and deliverable phase 1 'Heart of Granton', a Full Business Case for Phase 1 will be presented to Council committee for approval (and City Region Deal Joint Committee for noting). Granton Waterfront - Completion of a full business case for heat network solution which may include seeking a delivery partner to enter into commercial arrangements to deliver a low carbon heat network.



4. The Deal – summary of progress

Due Date	Milestone
Summer 2023	Granton Waterfront - Full Business Case (s) for Phase 1 'Heart of Granton' and heat network solution will be presented to Council committee for approval (and City Region Deal Joint Committee if appropriate).
Summer 2023	Shawfair - Formation of Woolmet Park & The Wisp Park (Danderhall North)
End 2023	Shawfair - Draft Town Centre Strategy published
End 2023	Edinburgh Living - Target of 1,500 homes.

Strategic Added Value

- The seven strategic sites can collectively deliver transformational economic and social change both in terms of housing supply, circa. 40,000 homes, and for the local, regional and national economy, through maximising the economic benefits from the construction of new homes and ensure that jobs, training and apprenticeships are targeted towards disadvantaged areas across the region. These sites all require further work and business case development with most of these homes anticipated to be delivered over the next 10-20 years. Several of the sites therefore require a long-term commitment and investment from Government, agencies and key stakeholders.
- Housing is a key social, economic and environmental driver. Greater integration across these drivers and City Region Deal policy themes is essential to support the growth requirements of the region and to deliver new communities which deliver the quality of place that ensures the South East of Scotland is a desirable place for people to live and for businesses to invest. Advantages that the CRD partnership working is bringing to add value to the proposal.
- The **Edinburgh City Region Deal Home Demonstrator**, project will demonstrate the effectiveness of homes designed and constructed to net zero carbon. Using Modern Methods of Construction (MMC). MMC uses technology, new materials and contemporary on-site building techniques to improve efficiency and quality in buildings. This work is in collaboration with:
 - Scottish Government
 - Scottish Futures Trust
 - Off Site Solutions Scotland
 - Edinburgh Napier University
 - BE-ST (formerly Construction Scotland Innovation Centre)
- 75 Net Zero Carbon Homes at Granton Waterfront have been identified as the first **pilot' scheme** of the Edinburgh Home Demonstrator. Future work will seek to develop (and implement) a model for the design procurement, delivery of new affordable, net zero homes across the Edinburgh City Deal Region
- Midlothian Council has right of first refusal for affordable homes from Shawfair. The delivery of affordable housing in partnership with private house builders at Shawfair is making a significant contribution to the expansion of affordable housing stock in Midlothian.



5. Our Approach to Benefits Realisation

Our Approach to Benefits Realisation

As reported in last year's annual report, in taking forward the Benefits Realisation Plan (approved by the **Joint Committee in September 2020**) each City Region Deal theme lead has examined how best to monitor and evaluate future impacts. Individually, a range of approaches (including bespoke surveys, refining existing data and customer relationship management monitoring systems, creating new data sets and adopting the measures used in the **Scottish Government's National Performance Framework** and other similar indices) are being adopted.

Last year, the Programme Management Office (PMO) commissioned the Smart Data Foundry to recommend measures to be put in place so that outputs and impacts can be captured, measured and reported on by 2023 and thereafter.

Three main questions were explored, and in their **report to the City Region Deal Joint Committee in March 2022**, responses and recommendations were made, as detailed below:

1 Across each City Region Deal theme, and related projects, what outputs and impacts might be captured by 2023?

The report found stated that, by 2023:

- Only two of the City Region Deal themes (Research, Development and Innovation and Employability and Skills) will be in a position to report information concerning their outputs; and
- Only one theme (Employability and Skills) will have evidence in relation to the (intermediate) impacts of their activities.
- This position is likely to change significantly by 2028, when all themes (with the exception of Housing) will be in a position to report outputs and evidence of impacts.

2 What is currently in place to monitor and manage outputs and impacts and what additional processes, resources and partnerships with others could be put in place now, and going forward, to enhance the monitoring of impacts?

The report recommended three initial steps, which are in the process of being actioned by the PMO:

- Appointing a Senior Responsible Officer to oversee benefits realisation (now in place);
- Securing a Benefits Realisation Officer within the PMO to co-ordinate City Region Deal project and programme output and impact reporting (recruitment underway and expected to be in post by Autumn 2022); and
- Developing and implementing an outputs, outcomes and impacts reporting framework across all City Region Deal projects to complement and enhance the current output reporting already undertaken by the PMO (underway).





5. Our Approach to Benefits Realisation

3 Given the above, what actions should the City Region Deal Programme Management Office now take in relation to monitoring and evaluation with timescales, and responsibilities, going forward to 2023?

The report recommended that:

- All the City Region Deal projects review, and amend where appropriate, the proposed reporting framework and confirm the measurement approaches that they will adopt to capture agreed outcomes and impacts
- Based on the above, and with co-ordination and support from the Benefits Realisation Officer, all projects should review and (re)confirm the timetable against which defined outcomes and impacts will be reported pre and post 2023; and,
- Confirm with Governments their acceptance of the above and consequently agree the extent and nature of the outputs required.

These steps are underway and will be taken on as part of the work programme for the Benefits Realisation Officer, who is expected to be in post in Autumn 2022.

Other on-going steps recommended in the report, which are being incorporated into the PMO's workplan include:

- Further engagement with the Scottish Government Data Intelligence Network team to develop specific "user cases" and requests to Governments in relation, in the first instance, to accessing Longitudinal Education Outcomes (LEO) and Department for Work and Pensions (DWP) data for the future, by the Deal's Data-Driven Innovation and Integrated Regional Employability and Skills programmes;
- Encouraging the adoption by all projects of the City Partnership Community Benefits portal and consequent capturing and reporting of these benefits;
- Ensuring that all projects are involved in on-going engagement with Scottish Government in relation to the guidance on whole-life carbon costs and incorporation into business cases, procurement and ongoing operational commitments; and
- Nomination and case study development where projects can demonstrate high Strategic Added Value.

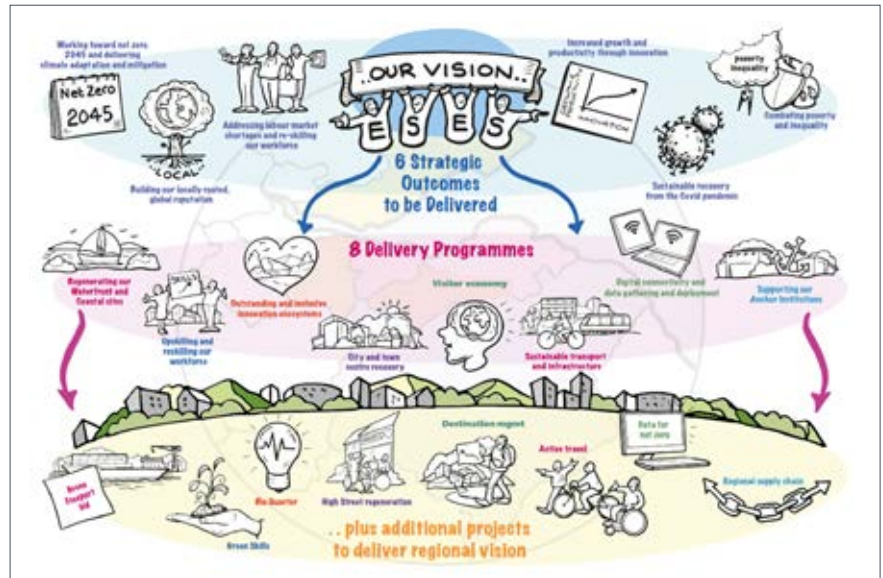


6. Regional Prosperity Framework

Regional Prosperity Framework

The City Region Deal partners have developed an ambitious 20-year economic framework called the 'Regional Prosperity Framework' (RPF).

The RPF was **approved by the Edinburgh and South East Scotland City Region Deal Joint Committee** on 3 September 2021, before being ratified individually by each of the six Local Authorities and the University of Edinburgh Court.



The RPF is the next phase of the development of Edinburgh and South East Scotland's regional economy, building upon the City Region Deal and the strength of the regional partnership. It is designed to be a single document that helps to shape where public and private investment, including **Levelling Up** monies, could make the best contribution to drive the region forward in a sustainable and inclusive manner.

The ambitious 20-year economic framework has a vision to:

Become the data capital of Europe. We will ensure the social and economic benefits of this capability extend to all. All sections of the community will have the opportunity to develop the key skills that will help to end inequalities in our society. We will protect our environment and make best use of our extraordinary built and natural assets, ensuring that the Edinburgh and South East Scotland City Region delivers a just transition to a net zero economy. Our institutions, ancient and modern, will deliver positive outcomes that enhance our local, national, and international reputation.

This work builds on the successes of the Deal, strength of partnership as well as the need to respond and recover from Covid-19 and its economic and social impact, and to address wider societal imbalances across the region within a net zero context.

It RPF aims to ensure the social and economic benefits of this capability extend to everyone in region and deliver inclusive growth, and aims to help the region protect our environment and make best use of the regions built and natural assets, ensuring that the region delivers a just transition to a net zero economy.

Following publication, partners have worked to ensure the RPF vision and ambition is delivered. Partners are currently finalising a framework for delivery that outlines how the region will deliver on the key themes of Resilience, Innovative and Flourishing, which were approved in the RPF. This approach has created eight critical Delivery Programmes with a clear programme of activities which will help us to realise the RPF vision. The eight Delivery Programmes are:



6. Regional Prosperity Framework

1 Regenerating our Waterfront and Coastal sites

2 Upskilling and reskilling our workforce

3 Outstanding and inclusive innovation ecosystems

4 City and town centre recovery

5 Sustainable transport and infrastructure

6 Digital connectivity and data gathering and deployment

7 Visitor economy

8 Maximising the role of our anchor institutions

Partners are now working to have the Framework for Delivery finalised and considered for approval at the Joint Committee meeting in early September 2022.



7. The Year Ahead

Date	Milestone
Summer 22	Opening of First building at Borders Innovation park
Sep 22	<p>Joint Committee meeting where the following items will be considered:</p> <ul style="list-style-type: none"> • West Edinburgh Transport Improvement Programme Update (presentation) • A701 Relief Road & A702 Link Road • Regional Prosperity Delivery Framework (verbal update) • Impact Scotland: Dunard Centre Education and Public Engagement Strategy Update • City Region Deal Annual Report 2021/22
Sep 22	First cohort of postgraduate taught students to be welcomed at the Edinburgh Futures Institute
Sep 22	National Robotarium fully operational and official launch
Sep 22	Completion of Business Units at Hillend & Donibristle Industrial Estate, Dalgety Bay
Oct 22	Helix.scot website launching as part of Integrated Knowledge Systems programme
Dec 22	<p>Joint Committee meeting where the following items will be considered:</p> <ul style="list-style-type: none"> • A720 Sheriffhall roundabout progress update • Integrated Regional Employability and Skills Programme Update (presentation) • Regional Prosperity Delivery Framework
Late 22/early 23	Public Local Inquiry for A720 Sheriffhall to be held
Jan 23	Tourism and Creative Sector future skills research to be completed by Labour Market Analysis & Evaluation programme
Mar 23	<p>Joint Committee meeting where the following items will be considered:</p> <ul style="list-style-type: none"> • Data-Driven Innovation Programme Update (presentation) • Benefits Realisation six-monthly update
Mar 23	Outline Business Case for West Edinburgh Transport Improvement Programme to be complete
Mar 23	Complete roll-out of Internet of Things (IoT) network in schools across the region by the Data-Driven Innovation Skills Gateway
Jul 23	Usher building construction complete
Jul 23	<p>Through the Agritech Hub at Easter Bush, the following will have been achieved:</p> <ul style="list-style-type: none"> • Established a Centre for Aquaculture Genetics and Health, developing a business plan to enable a step change in the aquaculture genetics activity. • Established a Centre for Data-Driven Breeding, developing a business plan to enable a step change in the genetic livestock breeding activity. • Developed Agri and Aqua accelerator schemes, to enable the next stage of company formation on campus



8. Contacts and External Links to Further Information

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Further Information

- Keep up to date with the latest news and join the mailing list at www.esescityregiondeal.org.uk
- **Data-Driven Innovation website**
- Download all Joint Committee reports including approved business cases at **The City of Edinburgh Council Committee library website**.
- Visit the **webcast library** to view recordings of each Joint Committee meeting

Links to City Region Deal Projects

Community Benefits Portal

Esescommunities.org

Data-Driven Innovation projects

DDI website (General)

Bayes Centre

Easter Bush (campus)

Edinburgh Futures Institute

Edinburgh International Data Facility

National Robotarium

Usher Institute

Innovation projects

**Edinburgh Innovation Park
(Queen Margaret University)**

Transport projects

**A701 Relief Road and A702 Link Road
(Easter Bush Road)**

A720 Sheriffhall Roundabout

IRES

Esescommunities.org

About IFSS (joinedupforfamilies.org)

HCI Skills Gateway

Homepage (esescmmunities.org)

For people | What We Do | DDI

Edinburgh and South East Scotland

**Labour Market Toolkit | Skills
Development Scotland**

Covid Jobs Portal (c19jobs.org)

Culture project

Dunard Centre

Housing projects

Blindwells

Edinburgh Living

Granton Waterfront

Shawfair

Tweedbank

Winchburgh

3rd November, 2022.
Agenda Item No. 6

Bad Debts 2021-22

Report by: Les Robertson, Head of Revenue and Commercial Services and
John Mills, Head of Housing Services.

Wards Affected: All

Purpose

This report summarises the irrecoverable bad debts that have been written off during 2021-22 by the Finance and Corporate Services Directorate and Housing Services.

Recommendation

Members are requested to note the content of this report which is required to be presented annually to this Committee as per the Council's Financial Regulations.

Resource Implications

There are no further resource implications as all bad debts written off have been fully provided for in the Council's overall bad debt provision.

Legal & Risk Implications

There are no legal implications in writing off irrecoverable debts and it prudent from a financial management sense to do so.

Impact Assessment

An Equality Impact Assessment (EqIA) is not required as there are no changes to existing service delivery and policy.

Consultation

Consultation will be undertaken with tenants around the Housing Revenue Account written off rent debt to meet the requirements of the HRA guidance and best practice.

1.0 Background

1.1 Bad Debts

- 1.1.1 This report details the debts that have been written off during the financial year 2021-22 in relation to council tax, sundry debtors and non-domestic rates and rental income. The Council is required to review the debt that is outstanding at the 31st March, 2022 and write off any debt that is deemed to be uncollectible from a prudent management perspective.
- 1.1.2 The Council budgets for a small level of bad debt in the form of a bad debt provision as there will always be a small percentage of debt which will not be collected, usually between 1% to 2.5% of charges raised. All write-offs listed within this report have been fully provided for within the bad debt provision or in the case of temporary accommodation within the existing service budget.

1.2 Write-off Process

- 1.2.1 Debt is pursued proactively by the Council and a variety of actions will have been exhausted before write-off is considered. Collection staff work closely with colleagues in legal services and external debt collection agencies to ensure that all options are pursued. Write-off is only considered where there is no realistic hope of recovery or where it is not economic to pursue recovery further. Debt which has been written off may still be pursued should a debtor's circumstances change in the future. This means that the fact that a debt has been written off does not necessarily always mean that the collection process ends.
- 1.2.2 As previously agreed, the Council applies a "fair collection policy" towards debt recovery which aims to give support where households are identified as vulnerable and taking robust recovery action against those who elect not to pay their debts. To this end, debt relief is given to vulnerable households where certain criteria are met and there no reasonable prospect to recover the outstanding arrears (i.e., the debts are deemed irrecoverable). These schemes are known as the Council Tax Allowance scheme and the Rent Allowance scheme, and all write offs using these schemes are approved by senior officers from within the relevant service.
- 1.2.3 The amount of debt that has been written off is always significant, however, this needs to be viewed in the context of the total charges levied and the Council's performance on the collection of the debt. The overall gross amount billed for each debt stream in 2021-22 is detailed below in Table 1: -

Table 1 – Gross Amount Billed 2021-22

	Council Tax	Non-Domestic Rates (Inc. BID Levy)	Sundry Income	Rents	Total
	£'000	£'000	£'000	£'000	£'000
Amount Billed	305,673	212,186	77,375	124,799	720,033

*Includes Water Service Charges and Statutory Penalties.

- 1.2.4 The total write-off presented in this report represents just over 0.96% of the total amount billed for 2021-22 and the total written off is well within the provision for bad debt already provided for within our financial accounts.

1.3 Economic Climate – Covid-19/Cost of Living

1.3.1 The bad debt written off, especially within Council Tax, is marginally higher due to the catch-up from the moratorium on sequestrations due to the pandemic. Otherwise, collection rates have generally held up during the pandemic. However, we now have the cost-of-living crisis and as relative household income falls, collection rates are likely to fall during 2022-23 onwards. The Revenue Service will continue to apply the fair collection policy and thus are spending a greater proportion of their resources in providing support to vulnerable households. To augment this work, we do plan to run a number of benefit take-up initiatives to support households and provide a rates hardship scheme to support businesses. A separate report from the Tackling Poverty Prevention Board will keep members updated on these initiatives.

1.4 Effect of Covid-19 on Bad Debt Provision

1.4.1 The only adjustment to the bad debt provision is to continue the increase of 0.1% to the provision for Council Tax, all other provisions for bad debt remain at the pre-pandemic levels. This is kept under review by officers to ensure the provisions are adequate and reflect the likely write off required in future years.

2.0 Bad Debts Written Off

2.1 Summary Analysis

2.1.1 A summary of the amounts written-off in 2021-22 and a comparison to the previous four years is shown below in Table 2: -

Table 2 – Bad Debt Written Off

	2021-22	2020-21	2019-20	2018-19	2017-18	2016-17
	£'000	£'000	£'000	£'000	£'000	£'000
Council Tax	2,657	1,792	2,402	1,337	1,456	2,103
Rents- Mainstream	963	1,520	1,153	1,393	1,157	1,043
Rents - Supported	1,175	772	946	1,367	1,188	916
Sundry Debt	762	1,177	1,186	1,176	610	482
Rates	1,386	678	1,552	1,347	2,895	2,609
Total	6,943	5,939	7,239	6,734	5,758	7,439

2.1.2 A more detailed analysis of the debt write-off is included within Appendix 1 of this report. This analysis outlines the reasons for write-offs under each debt stream. It should be noted that whilst we compare written off debt with the current year charges, the debt written off has been accumulated over a period of over 20 years, dependant on the debt stream.

2.1.3 Overall, there is a 16.91% increase in the total debt written off for 2021-22 in comparison with the previous year. The increase brings the amount written off in line with pre-covid levels and also takes into account the catch-up effect from the pausing of sequestrations etc due to covid-19 during 2020-21.

2.1.4 Fuller details of each debt stream are contained in this report from section 2.2 onwards. Irrecoverable debt also should be viewed in context of overall collection performance as detailed in the following table 3 below.

2.1.5 The overall collection rates across all debt streams have demonstrated acceptable performance, giving the ongoing challenges detailed in this report, whilst all bar the Council Tax show a reduction on previous year, all debt streams are well within the 5-year average. Officers continue to monitor the ongoing collection performance in line with local and national trends. The following table illustrates the in-year collection performance over the last 5 years: -

Table 3 – In Year Collection Performance

	2021-22	2020-21	2019-20	2018-19	2017-18	2016-17
	%	%	%	%	%	%
Council Tax	95.31	94.4	95.3	95.7	95.8	95.8
Rents	98.05	99.48	99.96	97.9	98.1	97.7
Sundry Debt	87.60	89.9	86.1	87.3	89.7	87.8
Rates	98.2	98.7	98.2	98.4	97.9	97.8

2.1.6 Debt is kept under constant review, and we benchmark our performance and look to make improvements in the collection process wherever possible. The overall results achieved in-year collection have been sustained against pressures both on resources deployed to collect debts which have been reduced to meet budget savings and the external environment which continues to see challenges from post pandemic and the cost-of-living crisis.

2.1.7 Each debt stream is analysed below giving further details of the overall collection of debt but not limited to the in-year collection stated in table 3 above. The emphasis for debt collection has moved away from the “in-year” collection rate and the team are focusing efforts on collection of all debt, concentrating on collection in relation to total income in terms of actual cash value collected.

2.2 Council Tax

2.2.1 The overall write off for Council Tax has increased from £1.792 million to £2.657 million which is an overall amounting to £0.865 million (48% increase). Whilst this represents a steep increase in comparison with last year, it still represents just 0.87% of the gross amount billed which is well within the bad debt provision set for the financial year 2021-22. The increase in debt write off is due to the following factors: -

(a) Previous Moratorium on diligence and sequestration action

During the Covid pandemic there was a temporary halt placed on diligence and sequestrations. The increase in this year’s debt write off is partly due to the catch-up effect as the systems catch up with backlogs in applications.

(b) Overall economic situation

Clearly the pandemic and cost-of-living crisis are going to affect ongoing recoveries and this the level of debt presented as irrecoverable. Unfortunately, this is likely to see a decrease in collection levels and increase in future debt write off.

2.2.2 The collection of Council Tax has increased back to pre-pandemic levels in 2021-22 when compared with 2019-20 financial year. However, this rate is 0.5% lower than the best in-year collection rate which was achieved in 2016-17 and 2017-18.

2.2.3 The team continue to develop generic collection staff who deal with all debt streams and dedicated recovery who officers specialise in the recovery specific debt streams.

2.2.4 Work continues to ensure the collection service is as efficient and customer focussed as possible incorporating new digital channels as noted below. To take this forward, operational responsibility for collection has been moved to the Customer and Online Service within the Communities Directorate to ensure all customer contact is rationalised into one service. The team still focus on improving the move to services to be digitally enabled. Key updates are noted below: -

- **Online Account:**

Work continues to promote the uptake of online access to Council Tax accounts. At year end (31/03/2022) there were 23,621 successful registrations for the online account access and during the year a further 4393 sign ups have taken place bringing the total to 28014 which represents around 15% of all households in Fife. Clearly a key target is to maximise the number of online accounts.

- **Direct Debit Take Up:**

By far the cheapest means of collection is Direct Debit and the latest figures show a slight decrease in the number of Households paying by this method. Overall, 68.56% of households pay Council Tax by DD (compared to 69.2% at the same time last year).

- **Payment Strategy:**

Work continues to review all payment methods concentrating on modernising the whole payment system. A payment strategy report was approved by the Policy and Co-ordination Committee in September 2021.

2.2.5 The overall cost of administration of Council tax decreased in 2021-22 to £1.53 per dwelling from £1.68 per dwelling in 2020-21. The overall cost continues to be the lowest in Scotland. The decrease has two main reasons: -

- (a) the reduced resources deployed to collect debt especially pay costs which reduced from £2.187 million to £1.964 million; and
- (b) increase of 855 chargeable dwellings were added to the Council Tax List during 2021-22 which reduces the overall cost per dwelling.

2.3 Sundry Debtors

2.3.1 The level of debt written off in 2021-22 for Sundry Debtors amounted to £0.762 million which represents a significant decrease on the previous year of £0.415 million from last year's write off figure of £1.177 million (a 35% reduction in debt written off).

2.3.2 The overall debt billed from sundry invoices decreased from £ 80.489 million in 2020-21 to £ 77,375 million despite the noticeable increase in invoices issued from 50,556 in 2020-21 to 60,765 in 2021-22. However, if we compare the number of invoices issued pre-pandemic (77,687 invoices issued in 2019-20) indicates the initiative to charge customers at point of service provision is having a positive effect on invoices issued.

2.3.3 The collection rate for the year has decreased from 89.9% in 2020-21 to 87.60% in 2021-22 but, overall, is around the 5-year average for collection of sundry debt which is 88.1%.

2.3.4 The costs of raising an invoice decreased. In 2020-21 the cost was £6.71 per invoice raised which is compared with an overall cost of £4.73 in 2021-22. The decrease is due to two main reasons: -

- (a) an 20.2% increase in the number of invoices issued (as detailed in para 2.3.2); and
- (b) a reduction in overall costs from £0.388 million to £0.287 million.

2.4 Non-Domestic Rates

2.4.1 The level of debt written off in 2021-22 amounts to £1.386 million which represents a significant increase of £0.708 million from the level reported in 2020-21 (£0.678 million). Clearly, the 2020-21 figure was artificially low due to pandemic effects and the overall write off for 2021-22 is more in line with the previous, pre-pandemic years. The protections afforded to businesses during the pandemic clearly reduced the write-off figures but now with an uncertain economic climate, the environment in which businesses operating in Fife can best be described as challenging and the likely outcome is a decrease in collection rates and an increase in write-offs in future years.

2.4.2 The non-domestic rates collection rate decreased to 98.2% in 2021-22 compared with the 2020-21 collection rate of 98.7%. Again, the pandemic has allowed the collection rate to increase due to the reduction in the number of businesses required to pay rates in 2020-21. The overall in-year collection rate is in line with the 5-year average.

2.4.3 The rates team continue to promote the online account and Direct Debit facilities for businesses but take up on both has been lower than expected and enhanced efforts will be made during this year to increase take up of both Direct Debit and Online Accounts.

2.4.4 The cost for the delivery of the service decreased significantly in 2021-22 to £3.92 per property compared with £14.19 in 2020-21. The overall reduction of £10.27 per property has two main factors:

- (a) increase in income from the 10% statutory penalties which increased from £179,540 to £384,189: and
- (b) the overall pay cost reduced from £312,146 in 2020-21 to £233,481 in 2021-22 which reflects reductions in resources deployed to meet budget savings.

2.5 Bad debts over £50,000

2.5.1 The Council's financial regulations state that members must be informed where a sum written off is more than £50,000 for any individual debtor. During 2021-22, there were 4 write offs exceeding the £50,000.

In three of these cases, the companies involved were either liquidated or dissolved and thus the outstanding rates charge was uncollectable. In the other case, which accounted for £466,806, relates to a business that was being charged on an incorrect rateable value in error.

2.6 Rents

2.6.1 Mainstream Housing

The total write-off for mainstream tenants (both current and former tenant) is £0.963 million in 2021-22 which is a reduction of £0.557 million from 2020-21 where the debt written off was £1.520 million. The full reasons for the write-off are contained as a separate listing within Appendix 1. The write off amount equates to less than 1% of the total rent due in 2021-22 and is within the limits of affordability set out in the Housing

Revenue Account (HRA) Business Plan and within the provision available within the HRA already set aside to meet the debt write off.

2.6.2 The reduction in written off debt in 2021-22 is primarily down to protections issued during the Covid pandemic regarding sequestrations and evictions (most notable is the fact that only £12,000 was written off post eviction which in previous year was in excess of £500,000). The Scottish Government have re-introduced the moratorium on evictions till March 2023 (at the earliest), so it is likely that the write off amount will continue to return at a lower-than-normal level during 2022-23 but it is expected that rent arrears will increase as a result of this policy decision.

2.6.3 Temporary Accommodation

Appendix 1 also includes a summary of temporary homeless accommodation rents that were written off in 2021-22. The overall write off for last year was £1.175 million which is an increase of £0.403 million on the 2020-21 write off which was £0.772 million. This write off will be contained within the bad debt provision provided within the general fund housing budget.

The main reason for the increase was two-fold:

- (a) the team had a focussed effort to identify debt that was deemed irrecoverable; and
- (b) the increase in rents charged in temporary accommodation, increased the debt write off.

2.6.4 Overall Rent Collection

Rent collection for 2021-22 reduced for the first time in the last 3 years but continues to be around the 5-year average. The service continues to prioritise the collection of rent at the same time as providing support to vulnerable households which has now been expanded to assist with heating costs impacting on tenants' ability to meet their rental payments. As stated above, the collection performance is likely to reduce due to the reduction in household income potentially impacting on overall rent arrears and future write-off figures increasing in future years.

3.0 Covid 19 and Cost-of Living Implications on Collection of Debt

- 3.1 In the last two annual write off reports highlighted the ongoing issues with debt recovery during the pandemic, this has now been superseded with the cost-of-living crisis widely reported in the press. The main causes of this crisis are well documented and reported and will have a negative impact on sums recovered going forward and thus a potential for an increase in irrecoverable debt in future years.
- 3.2 As stated earlier in this report, the Revenue Service continues to apply a "fair collections policy" when dealing with our customers. We have yet to see the full impact on Household budgets and thus overall collection rates, however, the trend across all debt streams so far this year would indicate an overall reduction across all debt streams regarding the in-year collection rates. The matter of ongoing bad debt provision will be settled during the budget setting process taking place on an ongoing basis.

- 3.3 We continue to work with our partners to ensure, wherever possible, support is provided to households through income maximisation, money advice and budgeting support. This work is being enhanced through the work of the Tackling Poverty and Prevention Board and a recently formed Debt Group which meets on a regular basis to identify trends and types of Households affected. The Board and debt group have introduced schemes of debt relief for Rent and Council Tax where circumstances demonstrate that the debt is likely to be deemed irrecoverable, this relief allows households the ability to move forward without large historical debt impacting on them.

4.0 Conclusions

- 4.1 The level of bad debts written off within 2021-22 is £6.943 million which is an increase of £1.04 million compared with 2020-21 financial year, where the amount written off was £5.939 million. The detailed reasons for the increase are contained in this report but the overall write-off is within the normal level expected.
- 4.2 When reviewing debt write off, it is important that this is considered alongside debt collection performance and that the level of debt written off within 2021-22 accounts for just 0.96% of the gross amount billed.
- 4.3 The impact of Covid19/Cost of living on ongoing collection rates is set out in this report. What is clearly not included is the potential for a serious impact of the reduction in household incomes on collection rates and increased bad debt going forward.
- 4.4 The consistent message from Fife Council is to offer support to vulnerable customers who need it and taking robust action against those who choose not to meet their obligations continues to have a positive impact on collections and clearly the majority of Households are maintaining their payments.
- 4.5 The Council actively pursues the collection of all debt. However, debt write off is unavoidable and occurs when individuals and businesses cannot pay their debts and it is an accepted best practice to ensure that irrecoverable debt is written off from our accounts from a prudent management perspective. All debt written off is within the provisions made or within the service budgets set.
- 4.6 All debt that is written off, if circumstances of the debtor changes, will be reviewed and, where appropriate, debts can and will be written-on and pursued.

List of Appendices

1. Bad Debts Written Off 2021-22

Background Papers

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

- Local Government (Finance) Act 1992 and subordinate legislation.
- Prescription and Limitations (Scotland) Act 1973

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Bad Debts Written Off 2021-22 (Excluding Rents)

	Council Tax	Debtors	Non-Domestic Rates	Total
	£	£	£	£
Sequestration /Liquidation	734,287	30,780	258,688	1,023,755
Uncollectable	1,256,760	555,599	1,108,364	2,920,723
Deceased	547,843	175,286	5,390	728,519
Untraceable	61,650	0	13,610	75,260
Small Balances/Other	56,198	463	15	56,676
Total	<u><u>2,656,738</u></u>	<u><u>762,128</u></u>	<u><u>1,386,067</u></u>	<u><u>4,804,933</u></u>

Bad Debts Written Off 2021-22 – Rents

2021-22 £000s		2020-21 £000s
MAINSTREAM - HOUSE RENTS		
294	Former Tenants Category A (Moved)	336
156	Former Tenants Category B (Absconded)	227
12	Former Tenants Category C (Evicted)	501
32	Former Tenants Category D (Deceased)	20
73	Former Tenants Category Miscellaneous	78
187	Former Tenants Sequestration	187
106	Current Tenants	159
<hr/> 952 <hr/>		<hr/> 1,507 <hr/>
MAINSTREAM - GARAGE RENTS		
11	Former Tenants All Categories	13
<hr/> 963 <hr/>	NET OVERALL TOTAL	<hr/> 1,520 <hr/>
TEMPORARY & SUPPORTED ACCOMMODATION RENTS		
189	Former Tenants Housing Revenue Account	173
986	Former Tenants General Fund Housing	599
<hr/> 1,175 <hr/>		<hr/> 772 <hr/>

3rd November 2022

Agenda Item No. 7

Finance & Corporate Services Directorate Performance Report

Report by: Eileen Rowand, Executive Director

Wards Affected:

Purpose

To present the 2021/22 performance scorecard for the Finance & Corporate Services Directorate.

Recommendation(s)

Members are asked to:

1. Note the arrangements set out in Section 1.0 to fulfil the Council's obligation to comply with Audit Scotland's 2021 SPI Direction.
2. Consider the Finance & Corporate Services Directorate performance information presented in Appendix 1.

Resource Implications

None

Legal & Risk Implications

There are legal requirements highlighted within this report, linked to a risk of regulatory intervention if the Council does not adhere to the standards and expectations set by Audit Scotland.

Impact Assessment

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

Consultation

None required

1.0 Background

- 1.1 Audit Scotland published an update on Statutory Performance Direction in December 2021. The Council is required to report a range of information setting out:
- i. Its performance in improving local public services, provided by both (i) the council itself and (ii) by the council in conjunction with its partners and communities.
 - ii. Its progress against the desired outcomes agreed with its partners and communities.
 - iii. Its performance in comparison (i) over time and (ii) with other similar bodies including information drawn down from LGBF in particular and from other benchmarking activities.
 - iv. Its assessment of how it is performing against its duty of Best Value, and how it plans to improve against this assessment.

Below is a Link to the Direction Statutory Performance Indicators published in December 2021: - [SPI Direction - December 2021 \(revised\)](#)

2.0 Performance Reporting

- 2.1 The Directorate's current challenges and priorities are detailed along with risks. Appendix 1 to this report is presented in the form of a balanced scorecard covering the areas of LGBF/P4, Customer, Resources and Service Operations.
- 2.2 Finance & Corporate Services Directorate is performing well, even with an increase in demand for support from Directorates and dealing with recruitment challenges to retain staff with the required skills set in certain roles.
- 2.3 Service's workforce planning in 2022/23 and beyond will be essential to ensure challenges around core skill development, recruitment and retention of a reducing workforce are addressed.

3.0 Conclusion

- 3.1 This report highlights the key challenges risks and performance in relation to the items that the Finance and Corporate Services Directorate oversees. In general, performance is good in a challenging time however there is always room for improvement.

List of Appendices

Appendix 1 – Finance & Corporate Services Directorate Performance

Report Contact: Eileen Rowand
Author Name: Eileen Rowand
Author's Job Title: Executive Director
Finance and Corporate Services Directorate
Email: Eileen.Rowand@fife.gov.uk

Current Challenges & Priorities

Key challenges over the past year include:

- Support Services have experienced an increased demand for their services and this is linked to the level of change and challenges that exist across the Council. Work has been advanced through the Directorate Change Board to capture the increase in demand and then to consider the need to prioritise activities. Demand for services is managed as part of the ongoing management of operational activities at a service level.
- A lot of good work was advanced on blended working and new ways of working during the year. This was part of the work advanced on 6 different workstyles across the Council with blended working being the most prominent for the Directorate. To date around 2500 employees have been identified as blended workers and a process has been ongoing to ensure they formally sign up, including issuing of equipment, access to blended working allowance and DSE provisions for working at home. Around 95% of those who are eligible have now signed up to this workstyle with 92% of eligible Finance and Corporate Services employees accepting. This has involved time and resource inputs from Services across the Directorate. Flexibility for all employee groups is recognised as a continuing focus within our agreed equality outcomes and at the same time ensuring that there is a strong focus on delivering services effectively.
- Optimising technology across the Council was critical during the Pandemic and the Council was in a strong position with the rollout of Microsoft Office 365 and other key technology. During the Pandemic, the shift to new ways of working was a key feature of our response and this was enabled through the technology that was in place. With a shift to home working and a corresponding need to work very differently on the front line, we have optimised the use of technology in terms of how we design work and deliver services. Whilst innovations in online services, new operating systems and digital transformation have been on our agenda for some time, the Pandemic enabled some of this work to be fast-tracked through our change plans. As a consequence of this, we have also recognised that an investment in our workforce is necessary to support the Council's digital journey and to develop a digitally confident and skilled workforce supported by strong digital leadership. We have responded to this by the formation of a newly established Digital Skills and Learning Team, which consolidates staffing resources from BTS and HR.
- Embedding Oracle Cloud to a business-as-usual state has drawn on resources. This is to be expected given that the Council moved to a new platform for Finance, HR, Procurement and Payroll within 2020. This was challenging due to the need to work remotely during the Pandemic and the scale of the change that required to be managed across the Council. This has led to resources being prioritised from Finance, HR, BTS and Revenue and Commercial Services as we continue to work through post-implementation issues. Work continues with services across the Council to help improve business processes and exploit system functionality.
- Across the Council, we are facing challenges in replacing several sizeable legacy IT Systems which were timetabled to run one by one, but delays caused by COVID mean they are now running concurrently. Supporting these system replacements will be challenging within current BTS resources. These system replacements will enable modern working practices and further transformation opportunities. Additionally, we expect demand on BTS resources for further system replacements and digital transformation work as Services seek to shift to cloud-based solutions and re-design services.

- There are a number of workforce issues facing the Council and the Directorate both supports work on these and manages the impact for the Directorate. Work around pay, recruitment, absence, health & safety and ensuring the wellbeing of employees are critical activities where there is a strong focus.
- Managing finances is another critical area for both the Council and the Directorate. The budget position and financial monitoring are reported to the Cabinet and the Scrutiny Committees.
- Supporting the new governance structure for the Council and delivering a training and development programme for members.
- Challenge of preparing a draft 2023 Valuation Roll for 30th November 2022 against a background of significant legislative change in non-domestic rating.

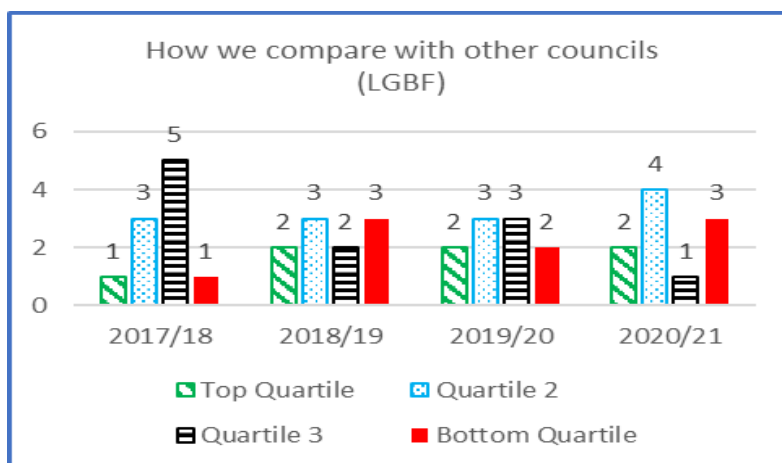
RISKS/EMERGING RISKS

The Directorate oversees the following strategic risks:

- **BTS004 ICT Failure** – a critical failure of council systems & information will not be available to support service delivery.
- **FC007 Legal and Regulatory Compliance**- the Council is unaware of changes to the national legislative, policy & regulatory framework.
- **FC019 Political**- There is a failure to adhere to the Council’s governance arrangements by Members or a breach of the Councillors Code of Conduct.
- **FC020 Safety and Protection for cyber security**- We are not prepared to take action to minimise or prevent cyber-attacks or Serious Organised Crime.
- **FCS001 Financial Sustainability** - The Council - and its partners - fail to deliver Plan for Fife ambitions. The Council's Financial sustainability is compromised.
- **HR005 Health, Safety and Wellbeing** – (Managing to minimise) the risk of accident, injury or harm to a member of staff, service user, contractor, or other 3rd parties.

Cost of living, poverty and plans for a National Care Service are emerging risks for the Council.

KEY OUTCOMES (LGBF)



The Directorates is performing above average for several LGBF indicators, however, there are still areas that are challenging and our performance as a Council is below average. Further narrative on these indicators is detailed throughout this document.

Performance Indicator	2018/19	2019/20	2020/21	2021/22	Q1 2022/23
Support services as a % of total gross expenditure - Fife	4.76%	5.69%	4.51%	4.02%	N/A
% of highest paid 5% of employees who are women Fife	57%	57.60%	59.20%	60.70%	N/A
The Gender Pay Gap (%) Fife	1.90%	-0.66%	1.80%	1.70%	N/A
Sickness Absence Days per Employee (excl. teachers) Fife – Average WDL per FTE	13.1	13.85	11.83	15.29	15.50
Invoices sampled that were paid within 30 days (%) Fife	96.50%	96.90%	94.60%	93.80%	N/A
Procurement spent on local small/medium enterprises (%) Fife	35.50%	31.90%	37.20%	41.7%	N/A
Useable reserves as a % of Annual Budgeted Revenue Fife	7.80%	8.40%	17.30%	22.50%	N/A
GF Balance as a % of annual budgeted net revenue Fife	1.80%	2.30%	5.18%	3.33%	N/A
Financing Costs to Net Revenue Stream - GF - Fife	8.37%	7.79%	6.08%	6.39%	N/A
Financing Costs to Net Revenue Stream - HRA - Fife	20.23%	21.54%	21.98%	22.04%	N/A
Actual outturn as a % of budgeted expenditure - Fife	100.29%	99.60%	91.98%	93.64%	N/A

- The increase in Support Services as a % of gross expenditure in 2019-20 was a result of the additional costs of the Oracle Project Team which was employed during 2019-20. The implementation was delayed due to the COVID-19 outbreak and some costs continued into 2020-21. The percentage has reduced again in 2021-22 to 4.02% which reflects the reduction in Support Service staff as a result of both budget reductions and recruitment issues.
- Encouragingly we continue to see the gender balance in our senior posts move towards a more accurate reflection of our workforce as a whole in which 72% are female.
- The gender pay gap remains relatively low and below the Scottish Local Government average of 1.7%. HR are working across Directorates to achieve Equally Safe at Work accreditation. As part of this programme we will be looking at initiatives to address vertical and horizontal occupational segregation.
- Absence is the area where we are currently in the bottom quartile in comparison to other Councils. The level of absence has returned to and exceeded pre-pandemic levels. 2021/22 was the second year of the Pandemic when staff had not yet returned to business-as-usual. Significant numbers were still working from home, and this did reduce short-term occurrences of absence. Research has confirmed that the local impact of the Pandemic reflects national findings where the more significant the deprivation the greater the impact of the Pandemic and this includes higher absence levels for a range of reasons. Delays for medical intervention (operations and treatments) has unfortunately increased long-term (over 4-weeks) sickness absences.
- Fife Council has remained in the top quartile for the percentage of invoices paid within 30 days despite the challenges of changing to a new system. Future developments such as Optical Character Recognition (OCR) and a focus on further enhancements on activity for invoices will bring further improvements.
- As part of Community Wealth Building, spending with local suppliers is a key target and the Council has done well in achieving above 40%. Significant improvements have been made in recent years. The Scottish average is under 30% and there remains to be a strong focus on this area at both a political and officer level.
- The notable increase in the percentage of useable reserves in 2020-21 was as a result of significant underspends and additional funding received late in the year. The percentage has increased again in 2021-22 to 22.50% which reflects the level of underspends in 2021-22 plus the level of government funding still held in balances. The majority of this is either earmarked or committed.
- The level of general fund balances that are not committed for any purpose as a percentage of the budget increased to 5.18% in 2021 which is higher than the policy minimum of 2%. This was a result of underspends and additional funding for the Pandemic. The level has reduced to 3.33% in 2021-22 reflecting some additional investment agreed as part of the 2021-24 Revenue Budget and short-term investment agreed earlier in 2021-22.

- The financing costs to the Net Revenue Stream (General Fund) decreased from 2018-19 to 2019 -20 as a result of implementing the revised Loan Fund policy. This policy allows for the loans fund advances to be charged over a longer period of time such as the asset life which reduces the annual cost as the payments are spread over a longer period. The adoption of this policy is in line with the Scottish Government Loans Fund Regulations and most authorities across Scotland have now implemented this. For 2021-22 the percentage dropped further to 6.08% and has stayed fairly consistent at 6.39% for 2021/22.
- This financing costs to Net Revenue Stream (HRA) indicator has steadily increased reflecting increased capital expenditure on HRA and Affordable Housing, therefore there is an increased cost of covering the borrowing associated with these projects. This remains fairly constant at 22.04% for 2021-22 and is in line with the agreed levels per the HRA Business Plan.
- The actual outturn as a % of budgeted expenditure prior to 2021 was around 100% reflecting that Directorates more or less managed expenditure to their overall budgets. In 2020-21 the percentage decreased to 91.98% which reflected the impact of the Pandemic. In addition, a significant amount of government funding was received late in 2020-21 and had to be carried forward. The percentage of 93.64% reflects the levels of one-off government funding that is held in committed balances plus a change in accounting treatment for some ring-fenced grants.

CUSTOMER

Performance Indicator	2018/19	2019/20	2020/21	2021/22	Q1 2022/23
F&CS Stage 1 Complaints actioned < 5 days	93%	79%	95%	100%	100%
F&CS Stage 2 Complaints actioned < 20 days	98%	75%	100%	100%	100%

The Directorate has seen a reduction in the number of complaints since Council Tax and Housing Benefit operations transferred to the Communities Directorate to integrate with Customer & Online Services. The Directorate continues to process complaints timeously and takes appropriate action where appropriate in response to improving service.

- **100%** of Complaints were actioned within 5 days above the annual target of **90%**.
- **100%** of Complaints were actioned within 20 days exceeding the annual target of **85%**.

RESOURCES

This section examines the performance indicators for the Directorate rather than those for the Council that are reported as part of the LGBF regime. The most significant resource for the Directorate is staffing therefore the indicators relate to this area.

Indicator	2018/19	2019/20	2020/21	2021/22	Q1 2022/23
Finance & Corporate Services - Average WDL per FTE	11.17	10.51	8.15	9.77	10.12
Finance & Corporate Services – Long-Term WDL per FTE	6.81	6.32	4.95	7.36	7.26
Finance & Corporate Services Workforce who are Female (%)	76.20%	73.20%	73.50%	74.90%	N/A
Finance & Corporate Services Workforce who are Full-time (%)	77.70%	77.40%	76.50%	73.00%	N/A
Finance & Corporate Services Workforce who are Permanent Employees (%)	81.80%	76.80%	78.60%	95.60%	N/A
Finance & Corporate Services Employees aged 24 and under (%)	3.40%	5.00%	4.70%	3.70%	N/A
Finance & Corporate Services Employees aged 29 and under (%)	8.00%	10.20%	9.50%	8.10%	N/A
Finance & Corporate Services Employees aged 55 and over (%)	22.10%	24.40%	25.80%	29.40%	N/A
Finance & Corporate Services Number of Voluntary Redundancies (FTEs)	11	17	2	4	N/A
Finance & Corporate Services Number of WYI Programme new starts	9	5	0	5	N/A

Areas are highlighted below:-

- Our headcount by age range peaks at 50 – 54, and we have approximately the same number of staff aged 55 and over as we do under the age of 40. This demographic is seen across the Council. This is concerning as there is a desire to bring more young people into the workforce however this is limited given the stable state of the workforce.
- Post-COVID, workforce matters such as retention, recruitment, training and development, and wellbeing have come to the fore. Many Services in the Directorate have found it more difficult to retain skilled staff and attract new talent. Our workforce demographic highlights a risk of loss of talent through early retirement, not offset by strong recruitment in lower age bands. Our workforce strategy (Our People Matter) sets out our strategic commitment to addressing those challenges and our work in Services and at a corporate level on workforce planning explores and tests solutions.

- The Directorate has supported new starts through the Workforce Youth Investment (WYI) Programme. This has been very successful. Services were able to start 5 young people utilising WYI funding, including a Graduate Apprentice in BTS, a Trainee Paralegal and 3 Modern Apprentices in Business Support. However, this is small scale activity given the scale of the workforce.
- In 2020/21, our average WDL per FTE reduced largely as a consequence of the Pandemic when staff were in lockdown and the vast majority were working from home and supporting the crisis. In 2021/22, as we returned to work either in full or on a blended workstyle basis, our absence rate has increased but remains lower than pre-pandemic levels, perhaps in part due to the flexibility many staff have in the way they work.
- The long-term absence rates have increased. The profile of sickness shows an increased number and duration of absences for conditions requiring hospital or medical treatment. Long COVID is now a factor in long term absence rates.

The table below provides information on **Finance & Corporate Services** workforce data by Budgeted (FTE) for the current year and the last 3 years.

Budgeted (FTE) April 2019	Budgeted (FTE) April 2020	Budgeted (FTE) April 2021	Budgeted (FTE) April 2022	Difference in FTE 2021-2022
1,272.16	1,102.11	1,069.42	1,033.90	-35.52

- We have, on a planned basis, steadily reduced the size of our Directorate workforce in response to budgetary and service change requirements. Managing workforce change on a planned basis was impacted by the pandemic and by post-pandemic responses to increasing demand, and much of the reduction in FTE is accounted for by natural turnover and non-filling of vacancies. Flexible retirement and flexible working requests have reduced FTE hours (in part, accounting for the decrease in full-time hours).
- At April 2022, the Directorate FTE has reduced by around 4% compared to April 2021 (around 3% between April 2021 and April 2020). Workforce planning in Services and at a corporate level over 2022/23 and beyond will be important to ensure that challenges around core skills development, recruitment and retention and wellbeing of a reducing workforce are addressed against the backdrop of increasing service delivery demands.

3rd November, 2022

Agenda Item No. 8

BUSINESS GATEWAY FIFE ANNUAL PERFORMANCE

Report by: Gordon Mole, Head of Business & Employability

Wards Affected: All

Purpose

The purpose of this report is to provide an annual overview of the performance of Business Gateway Fife Ltd in delivering services during the period April 2021 to March 2022, including Fife Council's financial assistance to businesses scheme. The report provides information on performance and highlights areas of ongoing service adjustments that took place to support business grant funding across Fife, during the latter phases of COVID impact.

Recommendations

It is recommended that the Committee agrees to:

1. consider the performance, expenditure, and activity information on Business Gateway Fife for 2021/22, as detailed in this report;
2. note the repositioned delivery focus to support Fife businesses during the latter phases of COVID impact; and
3. note the transition of ERDF Programme to UK Shared Prosperity Funding from 1st April 2023

Resource Implications

Business Gateway is a national programme funded by the Scottish Government to provide a consistent business advice and support service for stimulating pre-start, new start-up and engaging with existing businesses in a consistent manner throughout the country. Since 2008, delivery of this service has been devolved to local government. The budget allocated to deliver Business Gateway contract services for 2021/22 was £811,728. In addition, £145,000 of funds was allocated to deliver repayable investments for small to medium sized businesses through the Fife Investment Fund (FiF).

Financial Year	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Business Gateway Fife Revenue Budget	£895,000	£895,000	£842,000	£811,728	£811,728	£811,728
Fife Investment Fund	£245,000	£160,000	£145,000	£145,000	£145,000	£145,000

Legal & Risk Implications

The Service Manager, Economic Development is responsible for the strategic oversight of Business Gateway Fife Ltd, an arms-length external organisation wholly owned by Fife Council. The Council is represented on the Board by a Councillor nominee along with the Head of Business & Employability. Economic Development officers lead on operational delivery and compliance with robust monthly monitoring carried out on performance, including contractual income drawdown analysis.

The existing Business Gateway Fife European funding programme concludes in March 2023 (final claims may not be drawn down until December 2023). This external funding represents circa 33% of total funding that supports enhanced service delivery alongside the national core elements of business gateway delivery. Fife Council has now proactively submitted new bids to the UK Shared Prosperity Fund (UKSPF), which is intended to replace EU funding from March 2023. Robust intervention development is already underway to ensure transition into new funding programmes, with continuity and enhancement of service delivery. Supporting innovation in key sectors, workforce upskilling, trade development, entrepreneurship and providing specialist skills in carbon sustainability and energy generation.

Ongoing repositioning of staff roles during the latter phases of the COVID pandemic (October 2021 – March 2022) enabled support to the business base across Fife to administer the reintroduction of the “Strategic Framework Business Support” grant. Council officers along with Business Gateway colleagues, continued to engage in the management and administration of the grant as well as ensure audit compliance was in place as required by Scottish Government.

Impact Assessment

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

The Fairer Scotland Duty, which came into force on 1 April 2018, requires the Council to consider how it can reduce inequalities of outcome caused by socio-economic disadvantage when making strategic decisions. Both the Plan for Fife and Fife’s Economic Strategy align with this Duty in their commitment to working towards achieving inclusive economic growth, which is shared by all. The proposed action plan strengthens or will activate additional workstreams that contribute to the delivery of the Fife Economic Strategy and its aims to deliver further economic growth across Fife.

Consultation

The Head of Legal and Democratic Services and Head of Finance were consulted on this report.

1.0 Background

- 1.1 Business Gateway Fife (limited by guarantee) is an arms-length company, wholly owned by Fife Council, which was established, originally as a joint venture with Scottish Enterprise Fife, to deliver Business Gateway services throughout Fife. Fife Council is the sole member of the company however the company is governed by a business led board. The Council is represented on the board by a Councillor nominee and the Head of Business & Employability.
- 1.2 Business Gateway offers information, advice, and guidance to people thinking about starting up in business or growing their existing business. It is a national service with built in local flexibilities providing business solutions on a one-to-one basis for businesses with growth potential. It is supported by a national Enquiry Service and a national website with local microsites. Business Gateway services are managed by 18 Lead Local Authorities across Scotland. The Service Manager, Economic Development represents Fife on the Scottish Local Authorities Economic Development Executive Group (SLAED), and officers are engaged in national Business Gateway Network Forums.
- 1.3 Fife Council is responsible for ensuring that the services provided through Business Gateway are meeting the needs of the Fife business community and responds to market demand. The successful delivery of Business Gateway services is vital to achieving the Council's strategic economic and business development objectives. In this regard, Fife Council seeks to continuously develop and deliver services aligned to its business users, to develop genuine business engagement and achieve more local accountability for the services it delivers.
- 1.4 The Council's Business and Employability service also works to integrate with other local authority services such as Corporate Procurement, Property Services, Planning, Trading Standards and Revenues teams. Furthermore, Business Gateway services are dovetailing more effectively with national enterprise agencies and intermediaries to improve alignment and coverage. The provision of a 'one door approach' for the delivery of business development services and partnership working is fundamental to maintaining and improving Fife's business customer experience and contributes to growing local business success.
- 1.5 The policy rationale for Business Gateway Fife is that it addresses two key objectives of Fife's Economic Strategy 2017-2027:
 - To ensure that small to medium sized businesses seeking to start-up and grow have access to high quality advice, local information, and support; including how to access business finance; and
 - To improve Scotland's and Fife's historic low business birth-rate and the slow rate of growth and productivity of indigenous businesses.
- 1.6 In addition to continuing to implement these strategic aims, Business Gateway Fife was integral in supporting the actions set out within the Leading Economic Recovery Action Plan approved by the previous Policy & Co-ordination Committee and developed through the Council's reform and recovery process. Specifically, Business Gateway Fife services have assisted in the delivery of four of the six priority action areas:
 - Provide signposting, advice, guidance & support to local businesses
 - Stimulate economic demand / support access and mobility

- Protect local employment
 - Support and deliver investment-led economic growth
- 1.7 Fife Council proudly promotes an enterprising and entrepreneurial culture at grassroots level through enterprise in education collaboration and stimulating awareness of, and demand for, business support services (both public and private sector) among Fife's business base.
- 1.8 The Council was successful in being awarded the Most Enterprising Place in Britain at the Enterprising Britain UK Awards in October 2018 and continues to be creative and innovative with development of enterprise programmes for young people.

2.0 Issues and Performance

- 2.1 Business Gateway Fife operations were adjusting “back to mainstream business” prior to the Covid-19 Omicron variant in early October 2021. However, as the delivery of operations had already adapted, staff were working from home, with full deployment of mobile IT systems in place – ensuring customer services was paramount and the service was able to react proactively.
- 2.2 Scottish Government sought support from local authorities, via SLAED, to activate the previous “Strategic Framework Business Support” grant (covering hospitality/table service/leisure and B&B sectors) to assist with restrictions implemented at that time. As our financial grant systems were digitally managed and held all previous COVID business data - this ensured we were able to respond timeously to assist and get additional funding out to businesses under distress, using previous tried and tested administration processes. During this period, 3,125 business applications were supported with grant funding equating to £34.1M.
- 2.3 Business Gateway training workshops and webinars had previously been adapted to deliver digitally therefore continued throughout the remainder of the operational year. All Advisory Services that had initiated face-to-face support again, were provided online to ensure continuity with business support needs. Where businesses wished to seek face-to-face, all necessary risk assessments were carried out.
- 2.4 As expected, performance impacts did occur as Business Gateway had to reengage in the provision of COVID Funding. Expert Help specialist services were delayed due to prevention of business site visits to support product/process and workforce interventions. Although a fundamental element to our enhanced service offerings, it proved challenging during this period to deliver an effective service. Advisors were focussed on supporting “the here and now” challenges with businesses and referral to expertise in some of these specialist fields was limited as businesses (particularly manufacturing) had to refocus on the workforce challenges that Omicron variant had brought about. That said, experts with the specialisms of digital technology and web solutions were still required, to help those businesses who were adapting their online trading and digital profile.
- 2.5 The repurposed Fife Business Matters (FBM) publication had adapted during 2020 into an online e-zine to showcase the fantastic work of Fife businesses supporting the COVID response and their resilience in adapting their business models. This proved very successful during this period with informative updates on case studies from businesses supporting the COVID impact too by repurposing their product offerings, such as thermostat components for temperature machines, PPE equipment, fixtures for the Louisa Jordan temporary hospitals and various forms of

hand sanitiser production. The publication is now fully digital, delivered monthly due to ongoing demand from firms for business features.

2.6 **Business Start Up**

- 2.6.1 603 start-ups were supported in 2021/22 against a target of 600 (up 84 on previous year). It is anticipated that these start-ups will support the creation of 778 jobs (up 102 on previous year). Start-ups by Women were 51% of total start-ups, which is well above the national average and up by 3% on previous year.
- 2.6.2 Young People start-ups equated to 28% (no change on the previous year) of overall delivery, which is encouraging performance and linked to the ongoing small grant to assist young entrepreneurs.
- 2.6.3 As set out in Fife's Economic Strategy 2017-2027, Fife Council continues to prioritise start-up services to support enterprise and employment opportunities within Fife and across communities. That said, it is fundamental for the strategy to remain focussed on services that will support the early growth start-up market and using more digital and online solutions to support the volume of life-style businesses. The refresh of the Fife Economic Strategy 2022-27 is currently underway and will set out the approach the Council will take over the next five years to promote inclusive and sustainable economic resilience and growth in Fife.

2.7 **Business Growth**

- 2.7.1 BG's activity during 2021/22 showed increased levels of online engagement with businesses during this period and 1007 individuals attended 171 adapted surgeries and training workshops. Through wider economic development provision, tailored solutions were delivered to some client groups (such as female/young people/olderpreneurs) as well as business industry sectors (such as manufacturing, tourism including food/drink production) to assist with increased trade development, innovation, and digital solutions.
- 2.7.2 Increased levels of local advisory support resulted in a positive achievement against start up services. Existing business advisory services saw much needed assistance to 1219 indigenous businesses. Support for ongoing COVID challenges as well as economic resilience and sustainability needs.
- 2.7.3 Through Business Gateway operational delivery, Fife Council continues to support an enhanced European Business Competitive Programme for Small and Medium-sized Enterprises (SMEs) across Fife. During 2021/22, 100 businesses received more intensive Expert Help assistance from 33 specialist advisors across a variety of business themes.

Key 2021/22 headline performance indicators are outlined in Table 1 below – more detailed information is available on Appendix One attached.

BG Target Performance Table 1

<i>Measure</i>	<i>Actual 18/19</i>	<i>Actual 19/20</i>	<i>Actual 20/21</i>	<i>Actual 21/22</i>
BG Start Up Services				
Business Skills Workshops	71	65	60	56
Business Skills Attendees	526	520	304	285
Total Start Ups	552	615	519	603
-Starts By Women	305	299	250	308
No of job created from Total Starts	720	813	676	778
BG Business Growth Services				
Business Skills Workshops	136	132	108	95
Business Skills Attendees	965	864	793	722
Business Advisory Services	867	1173	1257	1219
Expert Help Assists	137	98	85	100

2.8 Financial Assistance to Business

- 2.8.1 Fife Council provides funding to allow Business Gateway Fife to administer the Council's Financial Assistance scheme to support small/medium sized businesses. Assistance may be provided for a range of property, product, process improvements, innovation, and market assistance. Up to a value of £10,000 of repayable grant, non-interest-bearing. This funding can also sit alongside commercial loan funding to support a financial package of business investment.
- 2.8.2 During 2021/22 whilst the teams were administering COVID grants, some 58 local funding applications were approved across a variety of industry sectors, this investment is forecast to create 49 jobs over 3 years. A pipeline of application submissions in process too, with some tending to take time to undertake due diligence so commitment may roll over into the next financial year. Although, businesses have been focussed on economic resilience

rather than investment, this repayable grant scheme continue to demonstrate the successful demand and highlights the benefits that even low levels of financial support can provide for small to medium businesses across Fife.

2.8.3 As part of the Council's European SME Competitiveness Programme for Businesses, local grants are made available to support Workforce Development Upskilling and Trade/Market Development, up to a value of £2k. 84 applications were approved for support during 2021/22.

2.8.4 Fife Council continues to be a key part of delivery of the pan-Scotland local authority loan fund – Business Loans Scotland (BLS). The financial delivery is now 100% provision ERDF funding by the Scottish Government. During 2021/22, six Fife commercial loans were approved to the value of £740,750. Service Manager, Economic Development (who sits on the BLS Board) is working with national colleagues to monitor the transition from ERDF funding at the end of March 2023 to ensure continuity and sustainability of BLS as well as positioning within the wider Scottish Government financial schemes.

2.8.5 The ongoing development of financial systems has improved real-time data and compliance processes. Business projects can experience lengthy delays and be scaled back due to economic conditions at any given time. This functionality allows immediate write-backs to the fund balance to release previously committed grants, allowing approval of further applications that could not otherwise have been supported. An additional element to the system was introduced during 2020/21 to assist with the robust administration of COVID government grants and audit of same. Furthermore, enhanced adaptations to the system are taking place during quarter 4 of 2022/23 to support the continuity and compliance of grants under the new UKSPF.

Key 2021/22 headline performance indicators are outlined below:

BG Financial Performance Table 2

Measure	Actuals 17/18	Actual 18/19	Actual 19/20	Actual 20/21	Actual 21/22
Fife Investment Fund					
Number of Applications Approved	50	22	33	36	58
Value of Applications Approved for Payment	£152,866.48	£73,627.42*	£198,167.63**	£81,182	£98,916
Jobs created/safeguarded	345.5	131	154.5	165	123

* Underspend was due to committed projects rolling over

** overspend was due to rolling commitment from previous year

3.0 Conclusions

- 3.1 In conclusion, 2021/22 has seen Fife Council's Economic Development team and Business Gateway Fife continue to provide a wide range of advice and support to businesses during what can only be described as unprecedented times. This report outlines the agility and flexibility the council has continued to apply during this period, utilising government funding and readapting local funding mechanisms timeously to assist businesses.
- 3.2 European funding support has helped extend some of these services across the full spectrum of Fife's business base over many years. With the introduction of the new UKSPF, Fife Council will continue to identify opportunities to improve the services delivered by Economic Development and Business Gateway Fife and associated linkages with key partners to increase leverage of external funding.
- 3.3 The provision of a 'one door approach' for the delivery of business development services and partnership working continues to be fundamental to maintaining and improving Fife's business customer experience and contributes to growing local business success and community wealth building. With ongoing aspirations to make it easier for businesses to do business. The digital InvestFife platform continues to play a pivotal role in bringing services together to support inward investment and indigenous investment for Fife, showcasing the economic proposition.
- 3.4 Wider business development programmes such as the successful Culture of Enterprise Programme, Supplier Development Programme (SDP) and Trade Development Programme, (analysis shown in Appendix Two) are delivered directly by Fife Council Economic Development officers, working closely with Business Gateway advisory services to increase coverage and engagement to businesses.
- 3.5 For the operational year of 2022/23, with ongoing economic consequences arising from EU Exit, supply chain challenges impacted by the Ukraine conflict, and currently the "cost of doing business" due to the energy impact; the Council is seeking to prioritise and explore how business services remain fit for purpose and responsive to the business support environment. These services require to provide flexible and agile support to businesses across Fife. There is a need for the coverage and approach to be expanded, enhanced knowledge transfer of advisory skills required to interact with current business needs. This will continue to ensure that business sustainability remains a key priority for Fife Council and addresses economic transformational change.

Background Papers

- Appendix One – BG Key Achievements 2021/22

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KEY ACHIEVEMENTS 2021/22



BUSINESS START UPS SUPPORTED BY BUSINESS GATEWAY FIFE

603
NEW BUSINESS START UPS SUPPORTED

CREATING
778
NEW JOBS

WITH A
£17.4M
PROJECTED TURNOVER

SUPPLIER DEVELOPMENT PROGRAMME

663
BUSINESSES SUPPORTED TO IMPROVE THEIR TENDERING SKILLS

39.7%
OF FIFE COUNCIL CONTRACTS AWARDED TO LOCAL BUSINESSES



SUPPORTING EXISTING & GROWING BUSINESS



1,219
BUSINESSES ASSISTED

80
BUSINESSES HAVE RECEIVED SPECIALIST ADVISORY SUPPORT

213
RECEIVING HR EMPLOYABILITY ADVICE

DIGITAL BOOST

DIGITAL BOOST
power up your business

80
BUSINESSES RECEIVED 1-2-1 SUPPORT

FINANCIAL SUPPORT CREATED AN ADDITIONAL

40
JOBS



BUSINESS GATEWAY TRAINING EVENTS



171
WEBINARS DELIVERED

1007
ATTENDEES

83%
CUSTOMER SATISFACTION SCORE

COVID-19

PAID AS COVID GRANTS

£34,101,175

IN 2020/21: 7,116 COVID GRANT APPLICATIONS RECEIVED | £72.2M PAID

3125 BUSINESSES SUPPORTED



TRADE DEVELOPMENT

7
UK TRADE SHOWS ATTENDED

36
BUSINESSES SUPPORTED

353
ENQUIRIES RECEIVED



CULTURE OF ENTERPRISE

SCHOOL EVENTS
2108

112,052
INSTANCES OF PUPIL ENGAGEMENT IN COE ACTIVITY

INSTANCES OF BUSINESSES SUPPORTING COE DELIVERY
1,989

3rd November 2022

Agenda Item No. 9

Enterprise and Environment Directorate: Planning Services Performance Reporting

Report by: Ken Gourlay, Executive Director – Enterprise and Environment

Wards Affected: All

Purpose

To present the 2021/22 performance scorecard for Enterprise and Environment Directorate, Planning Services.

Recommendation(s)

Members are asked to:

1. Note the arrangements set out in Section 1.0 to fulfil the Council's obligation to comply with Audit Scotland's 2021 SPI Direction; and,
2. Consider the Enterprise and Environment Directorate, Planning Service's performance information presented in Section 2.0 and Appendix 1.

Resource Implications

None

Legal & Risk Implications

There are legal requirements highlighted within this report, linked to a risk of regulatory intervention if the Council does not adhere to the standards and expectations set by Audit Scotland.

Impact Assessment

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

Consultation

None required.

1.0 Background

- 1.1 Audit Scotland published an update on Statutory Performance Direction in December 2021. The Council is required to report a range of information setting out:
- i. Its performance in improving local public services, provided by both (i) the Council itself and (ii) by the Council in conjunction with its partners and communities.
 - ii. Its progress against the desired outcomes agreed with its partners and communities.
 - iii. Its performance in comparison (i) over time and (ii) with other similar bodies including information drawn down from LGBF and from other benchmarking activities.
 - iv. Its assessment of how it is performing against its duty of Best Value, and how it plans to improve against this assessment.

Below is a Link to the Direction Statutory Performance Indicators published in December 2021: -

[SPI Direction - December 2021 \(revised\)](#)

- 1.2 Planning Services submit annually a Planning Performance Framework to Scottish Ministers which sets out the Planning Authorities performance against a range of national indicators. Once feedback is receiving from Ministers, the Service reports to committee on that feedback and overall performance benchmarked across Scotland.

2.0 Performance Reporting

- 2.1 The Directorates current challenges and priorities are detailed along with risks. Appendix 1 to this report is presented in the form of a balanced scorecard covering the areas of LGBF/P4F, Customer, Resources and Service Operations. A current snapshot of Service Challenges is included along with a section on Risks.
- 2.2 Planning Services reports across two Scrutiny Committees, with Climate Change aspects reporting to the Environment, Transportation and Climate Change Scrutiny Committee. Text in italics within the Appendix relates to this.
- 2.3 Overall performance across Planning Services is positive, set against an increased workload and challenges in recruiting experienced professional staff. The performance indicators, whilst focused on the speed of decision making, reflect the increased workload and growing complexity in the assessment of planning applications.
- 2.4 Customer feedback is sought, improvements identified and actioned. Regular liaison with groups of customers assists in identifying improvements.
- 2.5 The Service's workforce strategy has developed over recent years with a positive balance in the workforce in respect of age profile. This should have medium- and longer-term benefits in maintaining a skilled workforce. The Royal Town Planning Institute have undertaken research in recent years ('Resourcing the Planning Service', June 2021) which has highlighted challenges nationally. This was informed by a national study undertaken by Skills Development

Scotland and partners ('Skills in Planning Research Paper', February 2021). Workforce planning continues around developing skills, retention, and recruitment.

- 2.6 The risks and emerging risks are set out in Appendix 1 to the report and highlight the importance of planning to Fife's economy. Risks are monitored regularly, and mitigation identified.
- 2.7 Planning Services more detailed performance reporting is undertaken annually through the Planning Performance Framework (PPF) as outlined in para 1.2 above. The latest and 11th version 'Fife Planning Performance Framework 2021/22' was submitted to Scottish Ministers in July 2022. Once Ministerial feedback is received a report will be presented to committee.

3.0 Conclusion

- 3.1 This report highlights the key challenges, risks and performance in relation to the items that the Enterprise and Environment Directorate oversees. Overall, performance in Planning Services is good, and the Service is seeking to make improvements in respect of the time to determine planning applications.

List of Appendices

Appendix 1 – Planning Services Performance

Background papers

- 'Resourcing the Planning Service', June 2021
<https://www.rtpi.org.uk/research/2021/june/resourcing-the-planning-service-key-trends-and-findings-2021/>
- 'Skills in Planning Research Paper', February 2021
https://www.partnersinplanning.scot/__data/assets/pdf_file/0016/23623/Skills-in-Planning-Research-Final-February-2021.pdf
- 'Fife Planning Performance Framework 2021/22', July 2022
https://www.fife.gov.uk/__data/assets/pdf_file/0016/406042/Planning-Performance-Framework-11-Final-Document-Accessible.pdf

Report Contact: Pam Ewen
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PLANNING

Current Challenges & Priorities

- Key challenges over the past year include:
 - *Addressing the Climate Emergency actions and associated strategic risks if not delivered.*
 - Increase in planning applications and related activity throughout late 2020 through 2022. Additional staff resources are currently being recruited.
 - Supporting Fife's economic recovery through the Covid-19 pandemic.
 - Demands created by Planning (Scotland) Act 2019; 49 new and unfunded duties.
 - *Climate literacy – achieving Fife Council as a Bronze level Carbon Literate Organisation, Planning Service as a Gold.*
 - Review of National Planning Framework 4 delayed through the pandemic and impact on timescales to review Fife Local Development Plan.
 - Working collaboratively with other services to deliver on the Housing Infrastructure Fund allocation through Edinburgh & South East Scotland City Region Deal for, and progressing delivery of, the strategic transport interventions at Dunfermline as part of strategic growth to ensure integrated delivery of infrastructure with new development consented.
 - Progressing delivery solution for new Primary School at Wellwood, Dunfermline to facilitate development and unlock education capacity.
 - Managing the number of planning applications and income, at the same time as an increase in the complexity of application assessment.
 - Recruitment and retention of staff.
- The current position of the Service reflects the key challenges outlined above. The current economic climate is likely to result in the number of Householder planning applications reducing, however, an increase in applications relating to Short Term let legislation for guest houses and bed & breakfast establishments, together with applications from businesses who wish to regularise developments which were implemented during the relaxation through the Pandemic is expected. Early work is progressing on the review of the Local Development Plan. A project plan is currently being finalised. This review provides the Council the opportunity for the Local Development Plan to be the spatial expression of the Plan4Fife and embed Place Leadership. Whilst the Council does not have the resources to assist community groups in detail in preparing Local Place Plans, guidance has been issued together with a workshop and video.

Addressing Climate Emergency is critical for Fife. The Service leads with the Reform and Recovery Board. Further work is being progressed to ensure that actions are worked up to have a lead, costed, and timescales clarified.

Housebuilding and other development across Fife is important to Fife's economy, creating jobs and meeting Fife's housing need. Housebuilding activity is buoyant and good progress is being made in realising strategic growth areas as allocated in the Local Development Plan.

Our staff are our most important asset, and we will continue to develop their knowledge, skills and experience, with a particular focus on growing our workforce and supporting mental health and wellbeing. We have embedded hybrid working.

- Monitoring of priorities, performance, and challenges is managed across the Service. Our annual Planning Performance Framework is submitted to Scottish Ministers and sets out the Planning Authorities' performance against a set of national performance targets and criteria. The Minister's

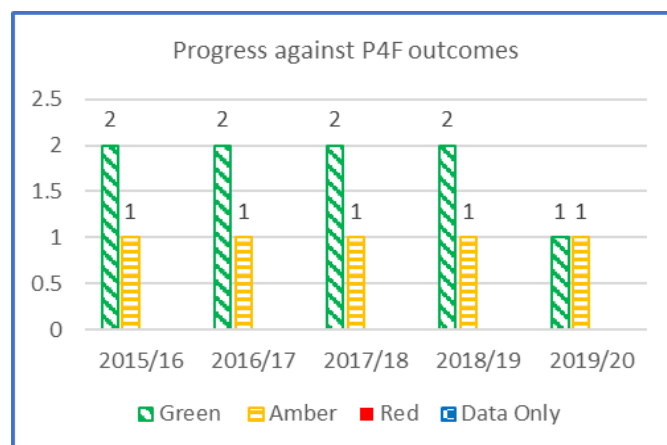
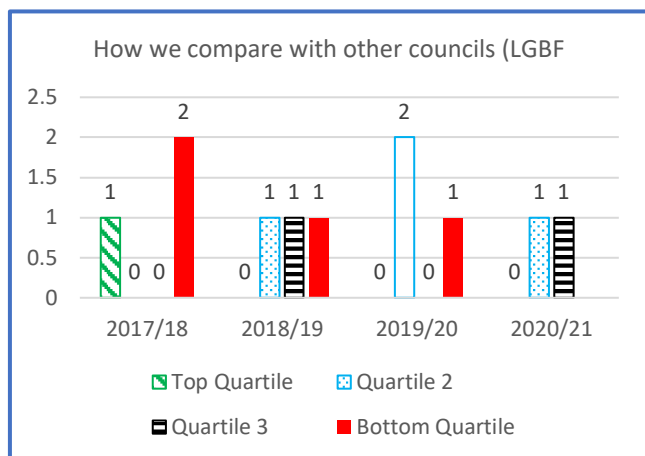
feedback to the latest (2021/22) Framework is due soon and will be reported to committee in due course.

- Continuous improvement is embedded, with a Planning Improvement plan currently being updated. LEAN process reviews are undertaken, ongoing customer feedback is sought, meetings are held with agents and developers to seek feedback, and the Service integrates any learning arising from complaints, appeal decisions and other feedback.

RISKS/EMERGING RISKS

- Planning Services are undertaking a review of Service risks and will implement any changes, including any arising from the Directorate risk management maturity assessment once undertaken.
- Emerging risks primarily relate to increase in costs to deliver new infrastructure and development. In respect of infrastructure this impacts on the Council's capital programme and is linked to facilitating development growth as set out in the Local Development Plan, to assist Fife's economic growth.
- The Service contributes to strategic risks EE002 Risk to the Fife Economy and *EE003 Climate Change*.
- The review of the Local Development Plan (FIFEPlan) has been considerably delayed as a result of delay in the implementation of National Planning Framework 4 as well as national Development Plan guidance being finalised. FIFEPlan is now 5 years old and technically is out of date.
- Changes in legislation arising from the Planning (Scotland) Act 2019 are continuing to come into effect. The risk primarily relates to the impact on resources to deliver the new legislative requirements within set timeframes.
- The risk of new development growth slowing is monitored through the annual Housing Land Audit and through regular discussions with the housebuilding industry. This risk is also aligned to the delivery of new strategic transport and education infrastructure required to mitigate the impact of new development. The delivery of the strategic transport intervention measures at Dunfermline is monitored and aligned with the Edinburgh & South East Scotland City Region Deal grant allocation for Phase 1.
- *Risks relating to addressing climate emergency will be reported to the Environment, Transportation and Climate Change Scrutiny Committee.*

KEY OUTCOMES (LGBF/P4F)



LGBF

Indicator	2018/19	2019/20	2020/21	2021/22	Q1 2022/23
Cost per planning application – Fife (LGBF)	£3,613	£3,985	£4,512	N/A	N/A
Avg Time Per Commercial Planning Application – Fife (LGBF)	9.6	8.4	11.1	N/A	N/A
CO2 emissions area wide per capita Fife (LGBF)	7.54	6.85	N/A	N/A	N/A

P4F

Indicator	2015/16	2016/17	2017/18	2018/19	2019/20
CO2 emissions area wide: within scope of LA per capita Fife (LGBF)	5.25	4.98	4.83	4.66	4.49
Area Wide Emissions (thousand tonnes of Carbon)	2941	2872	2806	2559	N/A
Total Fife Council Carbon Footprint – tCO2e	88965	83133	75956	62484	55784

(Note: indicators relating to climate change will be reported to the Environment, Transportation and Climate Change Scrutiny Committee.)

- The LGBF indicators as shown above reflect that the cost of processing planning applications is increasing. This is largely because of greater complexity and more detailed assessments that are required to consider and determine planning applications. The average time for determining commercial applications has fluctuates over the past 4-5 years. This is reflected more generally across all types of planning applications and is reported annually to committee through the Planning Performance Framework.
- The Service's performance has been impacted by the pandemic, which amongst other impacts resulted in the increase in planning applications, particularly householder applications. Applications for major developments remains buoyant, whilst there has been a decrease in local applications. This reflects a national trend, although Fife continues to attract major applications. Monitoring is in place to assist with improving performance in respect of the speed of decision making. Speed of decision making must be balanced with achieving quality outcomes.

CUSTOMER

- The figures below illustrate the high level of customer satisfaction that is being maintained. During 2021/22 the Service's customer survey was extended to a wider group of customers beyond those submitting a planning application. This now includes customers who have submitted a representation to a planning application.
- A thorough customer complaints process is provided and given the nature of planning a relatively high number of complaints are received (ADD NUMBERS). Any lessons learnt from these complaints are actioned and where required built into the Service's continual improvements.

Indicator	2018/19	2019/20	2020/21	2021/22	Q1 2022/23
Customers satisfied with planning service (%)	83.39%	82.02%	83.09%	72.73%	N/A
Planning Stage 1 Complaints actioned < 5 days	89%	100%	100%	77%	85%
Planning Stage 2 Complaints actioned < 20 days	72%	86%	81%	77%	67%

RESOURCES

- During 2022/23 the Service staffing budget increased by £347k as a direct result of the national increase in planning fees. Recruitment is ongoing and has been slower than anticipated resulting in an underspend within the current year for the Service. Recruitment for all posts is expected by early 2023.
- The Service has been supported through the Workforce Youth Investment programme which has allowed Graduate and Student temporary posts. In several instances, these individuals have progressed into permanent posts within the Service, assisting with the ongoing recruitment within a national/UK environment where there is a severe shortage of qualified Planners. A Future Planners project is being progressed nationally to consider ways in which opportunities to enter the profession can be supported.
- The workforce profile, as set out below, is positive.
- Regular continuous professional development programme is run across the Service and beyond, providing ongoing training and development opportunities. This is operated at a minimal cost.

Indicator	2018/19	2019/20	2020/21	2021/22	Q1 2022/23
Planning Service – Average WDL per FTE	N/A	N/A	DIV/0	5.43	7.02*
Planning Service – Long Term WDL per FTE	N/A	N/A	DIV/0	3.25	5.02**
Planning Workforce who are Female (%)	46.90%	37.10%	33.80%	37.90%	N/A
Planning Workforce who are Full-time (%)	77.60%	77.10%	82.40%	84.80%	N/A
Planning Employees aged 24 and under (%)	12.20%	10%	8.80%	7.60%	N/A
Planning Employees aged 29 and under (%)	14.30%	14.30%	17.60%	15.20%	N/A
Planning Employees aged 55 and over (%)	16.30%	21.40%	22.10%	31.80%	N/A
Planning staff who are happy at work (%)	80%	87%	79%		N/A

The table below provides information on **Planning** workforce data by Budgeted (FTE) for the current year and the last 3 years. *Rolling 12-month average to the end of Q1 i.e. 31.2.22 ** the amount of sickness absence over 4 weeks (the classification of long-term) included in the 7.02 figure above

Budgeted (FTE) April 2019	Budgeted (FTE) April 2020	Budgeted (FTE) April 2021		Budgeted (FTE) April 2022	Difference in FTE 2021-2022
66.34	63.55	72.09		75.66	3.57

SERVICE OPERATIONS

Whilst the key performance indicators below relate to the speed of decision-making, it is considered that the quality of the outcome of new development is a greater priority.

The Service is performing well in respect of progressing with implementing the Local Development Plan, FIFEPlan and the allocated development sites including the strategic growth areas. This assists with achieving the Council's outcomes relating to economic growth, meeting housing needs and facilitating with the delivery of strategic infrastructure.

The Table below recognises the increased workload combined with more complex planning assessments of applications. The increase in decision timescales is recognised and the Service continues to implement improvements to seek to improve performance against these national measures.

Indicator	2018/19	2019/20	2020/21	2021/22	Q1 2022/23
Avg time per Major planning application – Fife (weeks)	51.2	64.9	39.7	34.1	N/A
Avg time per Major planning application – Scotland (weeks)	32.6	33.5	41.3	44.6	N/A
Avg time per Local planning application – Fife (weeks)	8.8	8	9.6	13	N/A
Avg time per Local planning application – Scotland (weeks)	9	9.1	10	10.8	N/A
Avg time per Minor planning application – Fife (weeks)	7.5	7.3	8.2	11	N/A
Avg time per Minor planning application – Scotland (weeks)	7.2	7.3	8.1	8.7	N/A
Avg time per Non Householder planning application – Fife (weeks)	11	9	13	16	N/A
Avg time per Non Householder planning application – Scotland (weeks)	10.7	10.9	12.4	13.5	N/A
Number of housing completions per annum – Fife	1,118	1,088	818	N/A	N/A

3rd November, 2022.
Agenda Item No. 10

Annual Health and Safety Report 2021-22

Report by: Sharon McKenzie, Head of Human Resources

Wards Affected: None

Purpose

To enable ongoing scrutiny of Health and Safety activity.

The report updates Scrutiny Committee on Health and Safety activity since the report to Assets and Corporate Services Sub-Committee on 4th November, 2021. The report provides high level information with detail set out in supporting Appendix. A headline summary is available in Appendix 1.

Recommendations

Scrutiny Committee is asked to:-

1. review performance and activity for the 2021–2022 financial year;
2. note the progress made regarding improving workforce practices and performance in the organisation;
3. endorse continued focus on the priorities identified; and
4. advise on any further activity.

Resource Implications

None.

Legal & Risk Implications

Health and Safety at work is about identification of risk and elimination or management of that risk through control measures. The report identifies key health and safety challenges through 2021-2022, which was the second year of the COVID-19 pandemic.

Impact Assessment

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

Consultation

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

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

1.0 Background

- 1.1 This report provides an overview of the Council's health and safety performance during 2021/22. With the covid pandemic continuing to affect our operations, this was another challenging year for Fife Council and we continued to focus our efforts to safeguard the health and safety of employees, clients and service users across Fife. This report will focus on the challenges and achievements of 2021/22, and ongoing COVID impact and recovery.
- 1.2 Fife Council is committed to a positive health and safety culture and continual improvement in its health and safety performance. During this year, the main council governance framework for directorates and services, the 'Health and Safety Management Framework' was revised. The revision was to bring our framework into line with the updated Health and Safety Executive (HSE) publication HSG 65 – Managing for Health and Safety. The HSE update of the previous 20-year old document is intended to make it easier for larger organisations and business leaders to understand the actions they need to take to comply with regulations.
- 1.3 The Council's response to COVID-19 continued to demonstrate how our effective health and safety management supported safe working. Services continuously reviewed risk assessments to identify changing control measures relating to COVID-19. This was a dynamic process with guidance from Scottish Government experts changing rapidly and the service response keeping pace with new requirements.

2.0 Priorities and Continuous Improvement

- 2.1 During 2021/22, COVID-19 was still the main health and safety priority council wide with the aim of safeguarding of our employees and those accessing council premises. As a result, some of the other actions identified in the 2020/21 Annual report have not progressed as planned.
- 2.2 During 2021/22 with the continuation of the pandemic, Health and Safety has continued to be in the spotlight. In March 2022, one year on from the start of the pandemic, employees were still working from home with some returning to the office on a strictly controlled basis. The Health and Social Care partnership and Education and Children's Services, in particular, faced challenges to maintain service provision and keep employees and service users/pupils safe for in-person delivery, at a time when the guidance continued to change rapidly.

Ongoing Projects

- 2.3 Similar to 2020-21, the COVID pandemic altered how we carried out our normal activities and diverted resources in many service areas including the HR Health, Safety and Wellbeing team. Some business as usual was progressed despite COVID priorities and there are updates on these in the remainder of this section.
- 2.4 Driving at Work
 - 2.4.1 Fife Council have been rolling out a programme of checking driving licences through a third-party provider, Licence Check Ltd. As driving is an activity many employees undertake, the actual level of risk is high and sometimes can be overlooked.

2.4.2 During 2021/22, Services continued to add drivers to Licence Check Limited's DAVIS system. Driving licence checks were carried out for HSCP. The process was started with Children & Families and Criminal Justice. Due to the ongoing pandemic impact, the Education part of the Directorate was not included during this time period. Discussions will be held to agree the schedule.

2.5 Violent Marker System

2.5.1 The Violent Marker System (VMS), in combination with the Lone Working Solution, ensure that risk is minimised when home visits or remote working is undertaken.

2.5.2 The HSW team continued to review any violent incidents when the Violent Marker Review Group (VMRG) could not meet and ensured any incidents were actioned. Meetings restarted (via MS Team) to review current markers and a new Chair was appointed in February 2022. The volume of reportable incidents is low.

2.5.3 Elected members undertaking home visits can contact Legal and Democratic Services who can access relevant information on the VMS on their behalf.

2.6 Lone Worker Solution

2.6.1 In April 2020, we went live with the new system – Lone Worker Solutions (LWS).

2.6.2 Over 2000 devices (called SOS fobs) were delivered during the first few weeks of lockdown and HSCP and Children and Families and Criminal Justice were prioritised for issue at this time.

2.6.3 The regular reports from LWS indicated a low usage and the Lone Working Project Group initiated action within the relevant services to identify the reason and increase proactive supervision and use. Action is continuing to ensure good levels of use.

An additional information page with more detail is available by emailing Barbara.cooper@fife.gov.uk

2.7 Fire Safety

2.7.1 The aim of the Fire Safety Strategy is to ensure compliance with Fire Scotland Act Part 3 and Fire Safety Scotland Regulations, ensuring all relevant premises are competently assessed and fire precautions are identified and maintained. A Fire risk assessment priority list identifies premises by fire hazards, complexity and frequency of assessment and inspection. Fire safety continued to be given priority during the Pandemic. Although COVID-19 restrictions have delayed the programme by 12 months, the catch-up programme should have the process back on track by the end of 2022/23.

Additional information pages outlining the ongoing COVID-19 impact on the Fire Risk Assessment Strategy and significant work during 2021/22 are available by emailing Barbara.cooper@fife.gov.uk

2.7.2 The Corporate Fire Safety Management Group continued to meet on-line. This group oversees prioritised risk assessments and periodic document reviews and approval.

2.8 Manual Handling (People and Inanimate Loads)

2.8.1 Manual Handling training and Display Screen Equipment assessments are activities that aim to prevent the occurrence of musculoskeletal disorders, which account for around a

third of absences. During 2021/22, there was a continued focus on supporting care staff and those working at home.

- 2.8.2 Foundation/Induction training remained as busy as 2020-21 with clear peaks for recruitment drives in September/October and January/February 2022. HSCP funded a temporary extra member of staff and this extra resource has been essential to delivery of training with the additional numbers attending.
- 2.8.3 Pre lockdown, the average spaces offered for foundation per year were 330. The last 2 years have been running with >50% demand for this course.
- 2.8.4 Small child handling training has risen almost 2-fold in demand. Average places were 56 per year consistently for several years but it has now risen to 99 due to increasing nursery provision across Fife.
- 2.8.5 Load handling training is delivered by in service trainers but supported by the Council team. This year, Train the Trainer updates and a new Train the Trainer course has been run by the Royal Society for the Prevention of Accidents (RoSPA). Services who had to stop training in lockdown have mostly all now restarted training.

Additional information on moving and handling is available by emailing Barbara.cooper@fife.gov.uk

2.9 Display Screen Equipment (DSE)

- 2.9.1 The interim process for DSE implemented in 2020 continued into 2021/22 with the HSW team providing ongoing advice to around 2000 employees working at home and DSE set up. Although most office-based staff continued to work at home, arrangements were in place for some employees to return to work within the offices on a safe and controlled basis. We continued to support employees through provision of equipment such as DSE compliant chairs, monitors, keyboards.
- 2.9.2 DSE eLearning continued to be promoted with employees reporting issues through First Contact. Managers and the HSW Team are made aware of issues raised and then provided advice and support to resolve issues.

3.0 Health and Safety Risk Management

- 3.1 During 2021/22, the COVID-19 restrictions and guidance were subject to frequent review. Services have continued to review and reassess their working practices and implement control measures to ensure the ongoing health, safety and wellbeing of employees and deliver a safe and efficient service to our service users.
- 3.2 The challenges during 2021/22 were as numerous as the first year of COVID, but with a focus on returning to working with increased knowledge of the virus and how to prevent exposure. The Personal Protective Equipment (PPE) and hand sanitiser supply issues experienced early during 2020/21 had been resolved and were not an issue in 2021/22.
- 3.3 Recovery and Getting Back to work
- 3.3.1 Recovery continued during 2021/22 and we continued to support managers as they reviewed working practices to establish how jobs could be re-started and how to do so safely.

- 3.3.2 As before, this covered reviews of Risk Assessments, Safe System of Work, Business Continuity Plans and COVID compliance
- 3.3.3 Ongoing changes to working practices included: office staff continuing to work from home, safe social distancing within offices, provision of Personal Protective Equipment (PPE), use of face coverings and hand sanitiser; a continued review of the need for face-to-face contact with customers, clients, service users, pupils and H&S training online or Covid secure onsite training.
- 3.4 Public Health 'setting' referrals
- 3.4.1 The HR HSW team continued to provide support to our colleagues in Environmental Health. The HSW team receive information on covid positive cases within a Fife Council setting. HSW follow up this information with managers to discuss any breaches identified and any need to improve control measures. HSW have been periodically sampling practice to identify cultural issues and inform communications.
- 3.5 COVID-19 Risk Assessments
- 3.5.2 Services reviewed COVID risk assessments with changing restrictions and guidance.
- 3.6 Guidance Documents and Supporting Materials
- 3.6.1 The COVID-19 related guidance documents were kept under regular review and updated frequently to reflect the latest published information and advice.
- 3.6.2 In addition, we continued to provide supporting materials such as awareness posters and video clips.
- 3.7 Service Reports
- 3.7.1 As before, Services were asked to report on their performance during this period and identify successes and areas for improvement.
- 3.7.2 Services found the rapid changes and changing guidance challenging along with safely mobilising the workforce to point of need. Whilst this was undertaken and represents a success – supported by improving technology - there is a legacy to work through. This is due to the immense additional workload at the time and ongoing, and suspended provision to be reviewed and recovered. Services are now seeing more of the impact on individuals, particularly as face-to-face discussion becomes possible. Impacts vary: however, services are alert to the potential for staff requiring personal support and the consequences impacting for some time.
- 3.7.3 Currently, control measures (e.g. use of face masks) depend on the work activity. Some control measures are still mandatory or, where the risk is less, are available to the individual as good practice. The World Health Organisation is still reporting statistics on the pandemic but, at time of writing, in the UK the incidence of deaths, hospitalisation and where still conducted – testing, is currently showing a steady reduction. This is consistent with the high rates of immunisation (89.7% first dose, 85.7% second dose and 73.5% booster).
- 3.7.4 In general terms in the Council:
- Face coverings/face masks (mandatory in HSCP, otherwise individual choice)
 - Physical distancing (good practice but no longer a requirement)
 - Testing (reduced to specific groups but regularly under review with the aim of reducing further)

- Test and protect - the HSW team have stopped following up all cases where a FC employee was confirmed as COVID 19 +ve (Public Health 'setting' referrals) and will now give specific advice if requested by the manager.
- Safe homeworking (guidance available, checks undertaken as Blended Working contracts introduced)
- Vehicles and COVID (good hygiene practice continues to be recommended)
- Staff at work with COVID (HSCP have specific advice and the expectation is staff who have tested positive should work from home if they can and paid special leave)
- Visitors (we encourage good hygiene practice)
- Individual risk assessments/pregnant employees (New and Expectant Mothers Risk Assessments should be undertaken and following relevant health guidance is a normal consideration)

3.8 Learning and Development

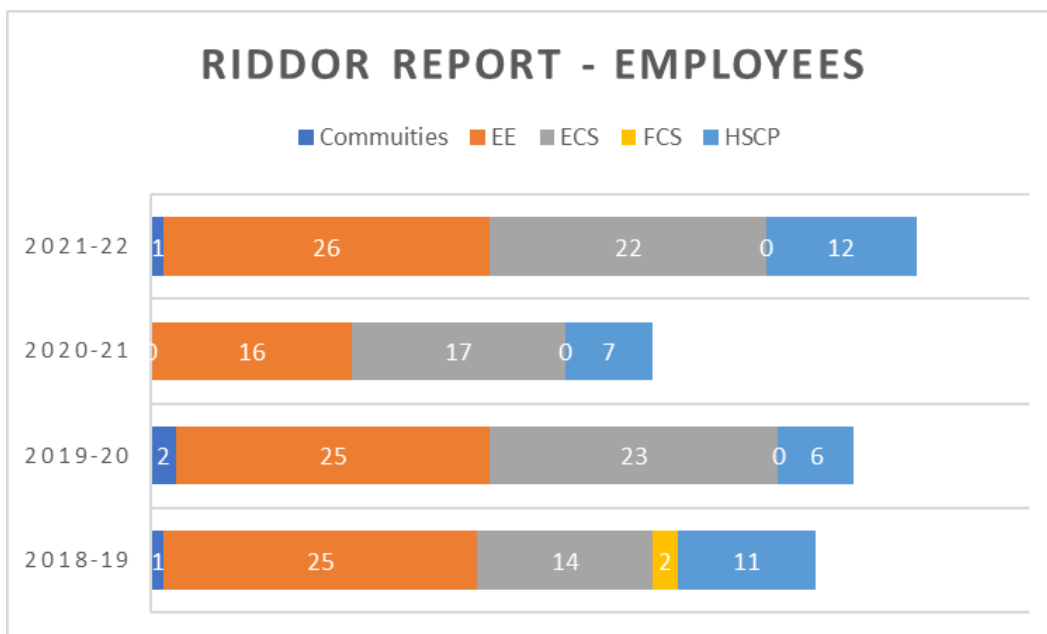
- 3.8.1 COVID-19 has continued to impact on certain H&S training. As can be seen in paragraph 2.8, significant effort continued to be put into people moving and handling training. Due to resources being diverted to support Services with COVID-19 issues, the Corporate HSW were unable to continue to progress significantly with the move to eLearning although courses such as First Aid were restarted in a COVID safe environment.
- 3.8.2 The Corporate Health and Safety Strategy Group (CHSSG) recognise that the impact of COVID-19 on H&S training is a risk to the organisation and have this as a standing item at meetings to review progress. The current issue with availability of training reports has hampered this exercise. This will be a focus for 2022/23.

3.9 Incident Reports

Reportable accidents/incidents (employees) to the Health and Safety Executive (HSE)

- 3.9.1 Fife Council is required to report more serious accidents and incidents to the Health and Safety Executive under the Reporting of Injuries, Diseases and Dangerous Occurrences regulations ([RIDDOR](#))¹. We report incidents to employees and members of the public. This graph relates to employees only.
- 3.9.2 The number of reports to the HSE has increased compared to the same time last year which is to be expected as COVID-19 restrictions relaxed and we started to return to normal working.

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



Detail:

3.9.3 From April 2021-March 2022 there were 48 injury/harm reports to the HSE and 13 relating to violence. This is an increase of 21 in employee related reports compared to 2020/2021.

- Moving and handling related reports increased from 4 to 10
- Workplace violence incidents increased slightly from 9 to 10
- Slip Trip and fall incidents increased from 12 to 21
- 3 caused by fall from height
- 2 relate to being hit by vehicles
- 2 relate to Hit by moving flying or falling object
- 1 "other" relating to a cut
- 1 related to needlestick injury

3.10 RIDDOR On Time Reporting

3.10.1 We continue to work with services to ensure effective investigation and timely reporting.

3.10.2 **COVID-19 RIDDOR reports**

In 2021/22 COVID became a reportable disease. The definition on when it should be reported has recently been narrowed given its now endemic nature. In 2021/22, 6 cases were reported to the HSE. This is a significant decrease from 44 in 2020/21. The reduction was predominantly before the narrower definition was introduced and probably reflects the efficacy of the national vaccination programme, increased awareness of COVID-19, its transmission routes and continuously improving training and control measures.

3.11 Moving and Handling Incidents

3.11.1 There was a significant increase in the number of employee manual handling incidents rising from 1.35 per 1000 employees (FTE) to 3.01 in 21/22. This can be explained by the resumption of normal working across many Services during this time.

3.12 Slips, Trips and Fall Accidents

3.12.1 There was a slight increase in the number of Slip, Trip and Fall Accidents per 1000 employees (FTE) from 7.32 in 20/21 to 10.11 in 21/22. There is no single incident cause

within this category: slips can be a result of wet surfaces (flooring/grass), food residue, ice, and other environmental factors. In each case, the incident was reviewed and corrective action taken to prevent a recurrence, where required.

3.13 Violence, Aggression and Threat (VAT) incidents - Employees

3.13.1 There has been a significant increase in the number of VAT incident recorded across all Directorates. However, this increase reflects the restart of Schools and lifting of other work restrictions put in place due to COVID. To obtain an accurate trend, we should use the data from 2019/20 as a realistic comparison.

Number of Violence, Aggression and Threat (VAT) incidents against employees (recorded as "physical")						
Directorate	18/19	19/20	20/21	21/22	Trend 202/1 vs. 21/22	Trend 21/22 vs. 19/20
Communities	12	4	2	6	↑	↑
Enterprise & Environment	19	15	10	20	↑	↑
Education & Children's Services	1095 (29 LTI)	1398 (33 (LTI))	632 (24 (LTI))	1127 (35(LTI))	↑	↓
Finance & Corporate Services	0	1	0	0	↔	↓
Health & Social Care	183	237	151	143	↑	↓

Number of Violence, Aggression and Threat (VAT) incidents against employees (Recorded as "verbal")						
Directorate	18/19	19/20	20/21	21/22	Trend 202/1 vs. 21/22	Trend 21/22 vs. 19/20
Communities	66	38	15	31	↑	↓
Enterprise & Environment	32	53	29	35	↑	↓
Education & Children's Services	311	345	112	282	↑	↓
Finance & Corporate Services	4	8	4	1	↓	↓
Health & Social Care	83	40	4	36	↑	↓

3.14 Reduction of Workplace Violence

3.14.1 The reduction of workplace violence continues to be a key focus within Fife Council and is one of the 4 areas identified as a Health, Safety and Wellbeing priority. Education and Children's Services and the Health and Social Care Partnership record the majority VAT incidents within Fife Council and are working on various actions to manage pupil behavior and training/development for staff. This has continued through the challenges faced by the services from COVID-19.

More detailed Education and Children's Services and HSCP Directorate information is available by emailing Barbara.cooper@fife.gov.uk

3.15 Accident Investigation

- 3.15.1 We require all specified injuries and dangerous occurrences² to have an accident investigation report completed within 4-weeks.
- 3.15.2 The Health and Safety team continue to work with services to identify reasons for later reporting and ways to improve. Late reports are also reviewed by the CHSSG.
- 3.15.3 Although we aim for 95% to be completed within this timescale, we acknowledge that ensuring a thorough investigation is also of major importance to allow appropriate follow up action to be taken, and this may exceed 4 weeks.
- 3.15.4 The Corporate team continue to engage with services if the report has not been completed on time. It should also be noted that the investigation time within Education can be affected by availability of staff over the school holiday periods.

3.16 Accident Reporting

- 3.16.1 We worked with colleagues in BTS to develop accident reporting scorecards using PowerBi. This enables up to date reports to be available for Directorates/Services to facilitate trend analysis and therefore enable services to more easily identify areas for improvement.

3.17 Employer's Liability Claims

- 3.17.1 Although the cost of claims is one of the Fife Council's performance indicators, this indicator is generally out with the influence of the Health, Safety and Wellbeing Team. We aim to reduce the number of accidents and occupational diseases through risk management, but the likelihood of an employee claiming, the claim amount and the historic nature of many claims is driven by a range of other factors.
- 3.17.2 There was an increase in the cost of claim settlements from £1,226,057 in 2020/21 to £2,097,981 in 2021/22 (awards varied from £294,126 for asbestos related disease to £2k related to an electric shock). As advised in previous years, individual claims vary significantly, which is why a local trend, i.e., at council level, would be difficult to discern for any reason. Some claims are the result of occupational exposure many years ago and ill health effects, like exposure to asbestos, may not manifest until a considerable time period has elapsed.

Industrial disease - 21 claims:

- 16 relating to asbestos
- 3 relate to use of vibratory tools (Hand Arm Vibration Syndrome (HAVS))
- 2 relate to noise induced hearing loss

Moving and handling – 10 claims

- Slip trips and falls

Claims classified as “other” - 14

² RIDDOR is the law that requires employers, and other people in control of work premises, to report and keep records of work-related accidents which cause death; work-related accidents which cause certain serious injuries (specified injuries); diagnosed cases of certain industrial diseases; and certain ‘dangerous occurrences’ (incidents with the potential to cause harm). There are also special requirements for gas incidents (see ‘Reportable gas incidents’)

- lifting (1),
- equipment/machinery (7),
- stress (1),
- violence (4),
- needlestick injury (1)

3.18 Health and Safety Executive Enforcement Notices

3.18.1 Where the Health and Safety Executive find a serious failing in the Council's management of health and safety, they can serve a formal Improvement or Prohibition Notice. (A notification of contravention is a letter identifying the material breaches of health and safety laws, how they have been broken, the required actions and the costs to pay for the visit.) In 2021/22, we did not have any Improvement Notices however we received a Notice of Contravention in September 2021.

3.19 Health and Safety Governance

3.19.1 The Council's Health and Safety Team continue to work with all services within Fife Council. This year saw the continued strengthening of relationships with increased communication, consultation and sharing of information as the pandemic continued.

3.19.2 During 2021/22, the Health, Safety and Wellbeing Team (HSW) assisted services to refresh or develop Risk Profiles which in turn support and complement the Council's Risk Assessment process by enabling the identification, evaluation and management of service-specific and service-wide occupational health or safety risks. H&S risk profiling provides Senior Managers with an overview of risk with which to review their controls. The H&S team will work with Directorate and Services advising on action plans to address gaps identified from the profiling exercise.

Further information on Risk Profiling is available by emailing Barbara.cooper@fife.gov.uk

3.20 Occupational Health

3.20.1 The current health surveillance programme has been operating since May 2017. During this time, we have worked with the provider and services to continuously improve the health surveillance programme. The provision was re-tendered during 2021-2022 for implementation April 2022. The Occupational Health contract was awarded to the existing supplier in April.

3.20.2 In 2020/21, COVID had a significant impact on how we maintained health surveillance. During this time most appointments had to be conducted by phone or video conference with rooms set up with COVID controls allowing operatives to undertake these assessments safely. It is good to report that all health surveillance, apart from spirometry, have resumed face to face. Appointments are conducted at various Fife Council locations, where suitable, or at PAM's offices in Glenrothes minimising disruption to Services where possible.

For the period 2021 / 2022

Appointments attended:	1,139
Cancelled:	26
Failed to Attend:	232

3.21 Stress Management

- 3.21.1 Stress isn't the same as pressure, which can be a positive force if managed well. Stress is an adverse reaction to excessive pressure or other types of demands which can cause physical or psychological ill-health.
- 3.21.2 Fife Council has the same commitment to managing the psychological risk of workplace stress as it does to other occupational health and safety risks. Although this workstream has been impacted by HSW team resources due to COVID and staff absence, we have continued to review, update and supplement information on the Council's intranet. There is guidance for employees and managers on preventing stress (causes of stress at work, manager responsibilities and using the HSE's stress management standards and tools). In addition, we have published the organisational risk assessment, developed a template for Directorate/Service risk assessments and prepared an exemplar to assist completion of the risk assessments.
- 3.21.3 CET agreed actions in March 2021 to strengthen the prevention and management of work-related stress. With the continuation of the pandemic, activity has predominantly been around raising awareness of the importance of good mental health. One of the specific commitments was to ensure the stress risk assessment process is used as a preventative measure when managing change, consistent with existing policy provision. As change activity starts to take place the expectation is that it will be undertaken using stress tools and thinking with an increasing focus on prevention.
- 3.21.4 A stress overview group comprising senior managers from each directorate with a remit to review the Council wide picture and agree priorities and actions has been stood up and will help to drive this forward.

4.0 Continuing and Future Work Priorities

4.1 Priorities For 2022-23

- 4.1.1 The priorities for the next year are to continue to manage and monitor our health and safety risks. Subject to any new COVID restrictions over the winter, we will focus on recovery and identification of workstreams delayed because of the pandemic. We will also continue our focus on health, safety and wellbeing, supporting our employees, customers, service users, clients, pupils and partners as we develop new ways of working post pandemic.

4.2 Health and Safety Strategy

- 4.2.1 As advised to Scrutiny Committee in April 2021, Health, Safety and Wellbeing are included in the Workforce Strategy 'Our People Matter'. The identified priorities - Stress, MSK, Violence & Aggression and effective Management of Health & Safety have not changed. Work related stress is the priority as it contributes to, and in extreme cases can cause, poor mental health.
- 4.2.2 It is an appropriate focus in a post pandemic context where there will be fragile employees and a notable change agenda. Also, as the expected economic recession and other factors in external environment add pressures to organisations and individuals, it will reduce the resilience of our workforce and taking steps to mitigate work related stress have increasing importance because of potential impact on service delivery.
- 4.2.3 Health and Safety is a statutory requirement, and the health and safety strategy is built on fulfilling our legal obligations as employers and the risks associated with our activities.

Supporting the wellbeing of employees is an important employer activity but it is not a statutory obligation. Because a sense of 'wellbeing' is based on individual perception, the main approach is to make available information and support options so employees can find options to suit them. Wellbeing information is available alongside health and safety information on the [council intranet](#) hub.

4.3 Effective Development of Systems

4.3.1 Over the next year, we will focus on continued management of the systems underpinning those priority areas identified earlier in the report:-

- Reduction of workplace violence
- Driving licence checks
 - Concluding implementation of this system
 - Review of driving at work documentation
- Lone working
 - Working with Services to monitor and enforce full utilisation of personal safety devices
 - transition to governance
- Occupational Health contract.
 - Streamlining processes, reducing the number of surveillance appointments classed as 'not attended.'

4.4 Health and Safety Risk Management

4.4.1 Due to resource issues within the H&S team some of the activities mentioned in last year's report have not been progressed. Therefore, over the next year our focus will be on those activities:-

- Working with Services to complete H&S risk profiles and assist with action plans addressing issued highlighted in the profiling exercise
- Review of compliance focussing on key areas such as moving and handling, DSE, HAVS.
- Reviewing the implementation of the Health and Safety Management Framework.
- Continuous review of deployment of the Fire Safety Strategy.
- Working with services to improve the uptake of moving and handling training for employees and deploying competency assessment to replace 'refresher training.'
- Reviewing compliance with corporate procedures.
- Developing and promoting e-learning
- Recovery plans for training

New project: Sharing of information

4.4.2 It is known that information that could be used to reduce the risk to employees when undertaking community visits, exists on different systems used across the Council but this information is not accessible to everyone. For most Council systems, access is restricted to users who have a justified business need to do so, normally based around their team/service function. This means there are potentially instances where employees are making risk assessments about visits without access to all the relevant information and if they did have access, this may influence their decision on how they should proceed.

4.4.3 The project will look at a solution that can be accessed by all services, that will pull and collate the relevant information from all the existing systems into one place and provide a hazard warning and a risk control recommendation. It is in its early stages with the Scope

definition document being completed the project proceeds for a feasibility study with the solution architects.

4.5 Health, Safety and Wellbeing Team

4.5.1 Like a number of other areas in the Council, there has been significant illness, change and turnover in the team so the team has lost expertise and there will be a period of transition as new appointees get acquainted with unfamiliar processes and systems. In addition, many organisations strengthened their health and safety teams during the pandemic so across Scottish local government HR departments are experiencing difficulty filling positions. A range of measures to strengthen the team are under active consideration, however, the cumulative impact of change and vacancies affecting half the team has had the effect of reducing delivery capacity. So, until the situation resolves, which is an unknown due to the many variables, timescales for delivering on future priorities are likely to be impacted.

5.0 Conclusions

- 5.1 This report presents information on key health and safety activities within Fife Council in another unprecedented year of challenges. There was significant work across the Council to safeguard the health, safety and wellbeing of employees, pupils and service users. We continue to effectively manage our occupational health and safety risks to protect the health and wellbeing of Fife Council employees and those who use our services.
- 5.2 As expected in the 2021/22 year, we were still significantly focussed on pandemic issues which has resulted in ongoing delays within several health and safety areas, however we are making plans for recovery. Hopefully, the 22/23 report will have more focus on strategic priorities and operational delivery.

Appendix:

1. Headline summary

Report Contacts

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ANNUAL HEALTH & SAFETY REPORT 2021/22 - HEADLINES



2021/22 - 2nd year of pandemic, regularly changing pandemic restrictions, most service activities moving closer to BAU. **Continuing** pandemic and other H&S advice, catching-up and big cross council service projects.



Key developments to large projects

- ★ Revitalizing Lone Worker system use and preparing for more information sharing about possible risks
- ★ Fire safety risk assessments prioritized and will be caught up by end of the year
- ★ M&H (moving and handling) training – despite +50% in people handing courses, all M&H catch up a challenge
- ★ DSE assessments including for home working, progressing well

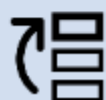


Other risk areas

21/22 increased from 20/21 in a number of areas BUT the main lockdown year 20/21 was not typical
 Violence, Aggression and Threat lower now than pre-pandemic, but remains an area of focus and action
 Employer's Liability Claims increased from 20/21 - includes historic issues



Stress, including work related, increasing from absence and surveys. Council Overview Group set up Tools refreshed and info available but increasing demand and workforce challenges.



Future priorities

Stress prevention, risk mitigation systems, activities that manage H&S risk

Health and Safety Annual Report 2020/21 Appendices

1. Overview
2. Lone working
3. Fire Safety (corporate health and safety information)
4. Fire Safety (property services update)
5. Moving and Handling
6. Reduction of workplace violence
7. Risk Profiling

ANNUAL HEALTH & SAFETY REPORT 2021/22 - HEADLINES



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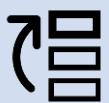


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Future priorities

Stress prevention, risk mitigation systems, activities that manage H&S risk

Lone Working

The Lone/Remote Working Group was set up to review the identified lone working groups, the usage of the lone working solution, and to review any proposed alternatives. The group continues to meet and in addition now acts as a forum for client feedback. When the system is fully operational, the group will overview a further project to investigate the feasibility of a single solution to share risk information electronically from the various systems throughout the Council. This will ensure that we share relevant information to maximise the safety of council workers and elected members. This is expected to start late 2022.

Training

Employee and supervisor training continued to be offered online and eLearning.

Monitoring

There was no change to monitoring regime and the “Safe Hub platform” provides Supervisors and managers with the tools to monitor, control and promote use of the device and associated services. Unfortunately, as we are still seeing a low usage of the devices¹, we need managers and supervisor to use this facility to monitor and enforce usage.

Integration

Covid-19 continued to affect the schedule for automation of the current system. The first integration scheduled between Oracle Cloud and the Lone Worker Solution (now known as Protect from Total Mobile) has experienced significant delays. The integration is required to ensure that the staff data between the two systems is kept in sync/up to date e.g., when new staff start, existing staff leave, where staff move between teams and to provide alerts/notifications for annual refresher training on personal safety etc.

We are relying on manual housekeeping exercises to keep data updated but this is not efficient as we are aware of many changes happening without the system being updated. A further integration is planned between Oracle Cloud and Protect so that fobs can be automatically issued to qualifying staff when they start with the council or returned when they leave. In addition, this integration will provide heightened training and awareness through eLearning and refresher training which can be monitored by managers.

All users are being sent a form to complete to update their data “Lone Worker Protect - Data Update”

User Survey

In April 2022 we issued a survey “Lone Worker Solutions - Your Feedback Counts!” to all users. We hope that this will provide user insight into why the devices are not being used as widely as we expect.

¹ A monthly Power BI dashboard is sent to members of the Lone Working Project Group. This is then discussed with Services.

Business Continuity Plans

Business Continuity Plans are still to be finalised. Each individual service must take responsibility for their plan which should then be combined with other services and held within SharePoint.

Concerns

Data held within the current solution is not consistent and it not up to date for all users. Some users of the system remain 'unregistered' meaning that they can raise panic alarms but if this were done there would be no contact information to locate that user.

Hazard Information sharing. At this time there is no central system which provides this information in one place. The information is spread out amongst various systems and is not shared either. It is also unclear how this data is kept up to date

The PowerBi reports continue to indicate low usage. This is an ongoing discussion with Services through the Lone Working Project Group and within the relevant Services.

Further Information

Report prepared by: Susan Harris

Health and Safety Lead Officer

Email: Susan.Harris@fife.gov.uk

Fire Safety

COVID-19 Impact

COVID-19 restrictions continued to impact routine the fire safety risk assessments programme with limited restart summer 2021 and care settings and schools initially delayed until November 2021 with restricted access until March 2022.

The Scottish Fire and Rescue Service audits were limited to essential visits only over the same period.

Fire Safety Risk Assessments Strategy

Corporate Fire Safety Risk Assessments (FSRA) are carried out by the Fire Safety Consultant with subsequent re-assessment over a prioritised 6-year rolling programme. FSRA periodic reviews (usually annual) are undertaken at a local level by Service fire risk assessors with corporate support.

Overall, COVID 19 restrictions delayed the programme by 12 months although periodic reviews are up to date. A catch-up process commenced with assistance from H&S Advisers and are expected to be up to date for end of 2022. Focus remains on maintaining compliance with national standards and the latest guidance.

Documentation

OHS-C-29.G2 Hot Work Permit Procedure and OHS-C-29.F2 Hot Work Permit implemented across Bankhead and Halbeath depots.

External Spaces Fire Safety Guidance/ Arson Prevention - all premises issued with updated guidance following publication of new insurers arson risk advice in August 2021. Additional supporting guide issued to Service Fire Risk Assessors.

Training

Periodic Fire Risk Assessor training catching up with new employees and overdue refresher training. Sessions commenced March 2022 with further sessions scheduled to bring all assessor training up to date by December 2022.

Insurance Surveys

Our insurers, Zurich Municipal, surveyed a range of high value premises across the school and corporate buildings estate. Feedback from the visits to High Schools and Leisure

centres was very positive with only minor housekeeping issues and some technical concerns with construction techniques.

Unfortunately, significant concerns were raised following a visit to Bankhead Central Depot. In addition to legacy sprinkler design issues, the inspection revealed poor housekeeping and management issues including uncontrolled smoking, poor external storage practices and an inadequate hot work permit regime. All improvement actions other than those addressing the sprinkler design, which is with Zurich, are complete. An enhanced workplace inspection regime addressed storage issues very quickly and a new hot work permit system was introduced in November. These and other common findings and actions were shared and implemented across relevant premises.

The Corporate Fire Safety Management Group (CFSMG) monitor findings and Risk Improvement Actions from the Zurich surveys across all Services premises.

Zurich Municipal have confirmed a survey programme of 11 premises for 2022/23 covering schools, galleries and depots including a short notice survey of Bankhead.

Kitchen Extraction Ducts

Kitchen ducts regular inspection and filter cleaning regime remains under review by FM. Duct inspection sampling conducted to establish baseline data for inspection frequency carried out at 8 schools will form the basis of a cleaning and inspection procedure.

New Workstyles/PEEPs in Corporate Buildings

With the introduction of flexible workstyles FM have completed a review of Personal Emergency Evacuation Plans for staff and General Evacuation Plans for visitors. Staff have been trained in the use of evacuation equipment and supporting arrangements implemented.

Unwanted Fire Alarm Signals (UFAS)

The Education Services Safety and Security Group continue to monitor Unwanted Fire Alarm Signals trends. Over the year, as COVID restrictions lifted, the number of UFAS increased with a particular increase in the number of faulty activations. Property Services have engaged with the servicing and maintenance contractor to confirm a process for isolating and replacing faulty devices.

Automatic Fire Alarm (AFA) Response

Fire Service are changing their response to automatic fire alarm signals for non-domestic and non-sleeping premises with a call challenge with no attendance unless questioning confirms signs of a fire.

An action plan has been developed and a small working group formed which is progressing actions. Consultation is continuing with the Fire Service, however detailed guidance

including exemption criteria and application process are still to be clarified. Property Services are investigating fire alarm configuration options and cost implications in anticipation of likely exemptions and continuing our efforts to reduce false alarms. Fire Safety Consultant is liaising nationally with other local authority representatives.

Housing

Tower Block Review Group

New chair appointed, Andy Graham, Business Change Manager, with quarterly meetings due to commence later in 2022. Outstanding actions include delays to enforcing the upgrade of privately owned flat entrance doors to appropriate fire rated standard. Fire stopping survey of Swan and Memorial Court is complete and works awarded to 3rd party accredited contractor. Government review of general needs flats personal emergency evacuation plans has deemed such plans impractical however industry guidance recommends consideration of plans as an outcome of Person-Centred Risk assessments.

Supported Living Fire Safety

Supported living fire safety standards issued to all premises including contracted service providers. Housing Services have purchased previously leased premises and, as part implementation of new standards, contracted service providers premises have been added to the Fire Safety Risk Assessments programme.

Further Information Contact

Contact Name: Paul MacKay Fire Safety Consultant

Telephone: 08451 55 55 55 x 446507

Email: Paul.Mackay@fife.gov.uk

Fire Safety Update Property Services

Fire Alarm Systems

Within the Educational estate we can confirm that there is a minimum level of protection to L3.

Compliance

All premises fire alarm and other protection systems servicing has returned to normal schedules and are maintained to recognised industry standards.

Vacant Buildings

In recognition of the risk of fire-raising, Property Services have started implementing a range of activities in relation to known vacant buildings.

Progress to date:

- frequent and transparent (weekly or fortnightly) inspections on 100% of our portfolio
- Early remedial works to reported issues
- enhanced physical security on 75% of the buildings.
- engagement of 3rd party specialist supplier,
- currently working with Procurement to ensure future frameworks reflect the needs for managing our vacant non-domestic & domestic assets.

Further Information Contact

Contact Name: Yvonne Gillespie, Service Manager (Programme Office), Property Services Bankhead Central. Telephone: 08451 55 55 55 x 446688

Email: yvonne.gillespie@fife.gov.uk

Appendix 5

Moving and Handling Update (April 2021-end March 2022)

Moving and Handling People (M&H)

The M&H team temporarily had an extra staff member funded by HSCP (until end July 2022) to assist with training and service support.

Foundation/Induction training has remained as busy as it was 2020-21 with clear peaks from recruitment drives in September/October and January/February. The extra resource has been essential to be able to cope with the additional numbers attending.

Pre lockdown the average places offered for foundation per year were 330. The last 2 years have been running with >50% more demand for this course

Small child handling training has risen almost 2-fold in demand. Average places were 56 per year consistently for a number of years but as can be seen it has risen to 99 due to increased nursery provision across Fife.

M&H COURSE	CLASSES	ATTENDEES	PERCENTAGE ATTENDANCE
Foundation 1 day	90	403	75%
Skills Update ½ day	38	170	45%
New Link worker (30hr course)	6	50	98%
New Competency assessor for Link workers ½ day	7	19	100%
Minimal Handling/driver course ½ day	2	11	100%
Linkworker update online with assignment	N/A	206	85%
Small Child handling	18	99	61%

SERVICE AREA	COMPLIANCE WITH M&H TRAINING 31/3/22
Community Occupational Therapy	OTAs 99% OTs 94%
Care at Home	Frontline 78% Link workers 85%
Community Support Services	Frontline 68% Link workers 95%
Adults Accommodation	Frontline 95% Link workers 80%
Older Peoples Care Homes	Frontline 90% Link workers 80%
Education & Children's Services	Data not available
AVERAGE	86% known

The M&H team support with risk assessments for children in Education and for complex cases in HSCP. They continued to visit service users in schools, hospital or at home to ensure successful discharge and ongoing care. This has remained stable although there has been pressure to support NHS staff with M&H to facilitate discharges as they are short of M&H staff.

Fife Council are registered as a Scottish Manual Handling Passport provider. However, we remain High Compliance rather than full compliance due to difficulties with measuring compliance and with some of the care providers we use not training their staff to Passport level. Work has started with the Care collaboration and with Scotland Excel to work to improve the care provider training standards.

In spite of the huge demand on the team 2 courses were written for online delivery and improved competency assessment procedures have been introduced.

Load handling

Load handling training is delivered by service trainers with advice from the corporate team. This year the Train the Trainer update and a new Train the Trainer course was run by RoSPA. Services who had to stop training in lockdown have mostly all now restarted training. With on-going delivery demands Facilities Management have had real difficulty being able to release staff to deliver and attend training however to manage this risk a corporate team manual handling trainer has been assigned to support them for 2 days a week.

Developments for load handling trainers to receive enhanced training to better support high risk manual handling assessments has not been possible to deliver due to workload across the council.

Generally work to review and improve the training programme has been delayed due to other workload priorities.

However, there has been the pilot of load handling competency assessments in Roads and Transportation. This replaces traditional classroom refresher training as staff are assessed handling as they work normally and, provided they meet the safety standards, they are confirmed as competent. This leads to a saving in training time and the opportunity to give practical direct advice on the job. Since the pilot it has been successfully rolling out.

Report prepared by: Emma Collins

Further Information Contact

Contact Name: Jim Forrest Moving and Handling Lead Officer

Email: Jim.forrest@fife.gov.uk

Reduction of Workplace Violence

EDUCATION

Reviewing the 'Management of Pupil Behavior' – Resource Pack and Professional Learning

Members of the Relationships and Behavior (R&B) Strategy group, including trade union representatives, have worked collaboratively to progress a key priority from the R&B strategy.

The priority is to specifically focus on supporting schools to develop the ethos and culture, and relationships and behavior in our schools in a way which supports consistency across all Fife schools, while allowing for schools to tailor to their specific context.

Key to successful implementation will be ensuring that schools have appropriate policies to guide their local approaches and a mechanism for engaging staff and other key stakeholders in developing this work to plan for sustainability.

Initially the R&B strategy group worked collaboratively to develop a publication to fulfil the following objectives:

- Develop Directorate guidance for schools on how to structure, form and implement their own R&B policy.
- Outline how schools can engage with their staff and other key stakeholders such as parents and pupils, to develop their R&B policy ensuring that staff feel safe and informed of and comfortable with, their own responsibilities.
- Consider the current Scottish Government policy and its role in supporting, improving the ethos and culture, and relationships and behavior in Fife schools.
- Reviewing the breadth and depth of training available for practitioners

As this work progressed, it became clear that it would be appropriate to review and update other relevant policy documents to further progress this priority. At this stage, it was agreed that we would develop a resource pack comprising of the following materials:

- De-escalation pack
- Physical Intervention
- Risk Assessment and Management of Pupil Behaviour
- Time out approaches
- Promoting Positive Relationships and Behaviour
- Weapons in school guidance

The resource pack will be shared widely for consideration and use at the beginning of the 22/23 session.

Relationships and behaviour are consistently identified as areas in which schools seek support and training. Therefore, to complement the resource pack, we identified the need to review the professional development opportunities for our practitioners on key topics linked to relationships and behaviour.

Fife Educational Psychology Service was asked by the Directorate Leadership Team to review the relationships, behaviour, and wellbeing support for school and identify key areas of focus that have the potential to support schools. The two areas identified were Trauma Informed Practice and De-Escalation, and it was agreed to offer these as core approaches to professional learning for all schools. These are being delivered on the November and February in-service days during the 22/23 session.

A key focus continues to be ensuring that all staff are aware of the processes that are established to support them and their responsibilities in engaging with those. To reinforce the agreed Directorate procedures for our schools we have used a number of platforms to continue to share and profile the appropriate publications to support our school practitioners:

- Awareness Raising Posters
- All Staff Guide
- Manager's Guide
- Debrief / Wellbeing conversation guide

Each of these publications are also stored on the new intranet for our staff to access. A new desktop shortcut to the HS1 form has also been created for all teaching staff to help save time in reporting incidents of violence and aggression.

Further Information

Report prepared by: Murry McBain
Policy Co-ordinator
Education & Children's Services
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CHILDREN'S SERVICES

HR Workforce Development Team continue to work with Children & Families and Justice Services to deliver CALM training² and systems to teams and practitioners with a particular focus on Residential Childcare and Foster Care.

Whilst theory training continued through much of the COVID-19 pandemic, minimal training could be carried out in relation to Physical Intervention training until 2022. However, this year has seen the development of a clear plan to get the vast majority of residential childcare workers trained in both CALM Theory and CALM Physical Intervention. This approach is all set in the context of reducing the use of restrictive practices in line with research which tells us that whole teams trained in both theory training and physical skills training are much less likely to use restrictive practices than those who are not.

² CALM is an acronym for Crisis, Aggression, Limitation and Management. CALM is essentially a model which promotes early intervention and prevention to minimise and manage behaviour that challenges services. All training delivered (either by Fife Council staff or CALM themselves) is developed by CALM training Ltd

Theory training, as aforementioned, has high completion numbers due to ongoing training through the pandemic whilst Instructors in the Service are implementing the plan and working through Physical Intervention training with teams.

The CALM Associate in the Service has 'real-time' access to incidents involving behaviour that challenges via Assyst. This allows for monitoring and evaluation and creates opportunities to minimise frequency and/or severity of incidents.

Foster Carers have also benefited from the online modules and webinars which provide theoretical models and strategies for managing behaviours that challenge.

CALM Training has also supported a few Foster Carers and families on a bespoke/consultancy basis where need has arisen for more support in the young peoples' homes.

HSCP

HR Workforce Development Team continue to work with HSCP to deliver CALM training and systems to teams and practitioners with a particular focus on Adult Services where the need for CALM training is more explicit.

Whilst theory training continued through much of the COVID-19 pandemic, minimal training could be carried out in relation to Physical Intervention training until 2022. However, this year has seen the development of a clear plan to get both CALM Theory and CALM Physical Intervention training back to pre-pandemic levels. This approach is all set in the context of reducing the use of restrictive practices.

Theory training, as aforementioned, has high completion numbers due to ongoing training through the pandemic and Instructors in the Service are implementing the plan and working through Physical Intervention training with teams on a priority basis.

Managers in areas where CALM training was being introduced as a relatively new model (theory only), namely Home Care Service and Older Peoples Service, have been consulted with regularly during the pandemic about their ongoing training needs in this area. Understandably, this area of training was not seen as a priority locally. This mirrored the national picture, hence no development of online resources for these groups. Notwithstanding this, plans are now in place to re-introduce face to face training to these groups this year.

CALM Associates across HSCP have 'real-time' access to incidents involving behaviour that challenges, via Assyst. This allows for monitoring and evaluation and creates opportunities to minimise frequency and/or severity of incidents.

Further Information

Report prepared by: Stephen Smith

Lead Officer (HR Workforce Strategy & Organisational Development)

Email: StephenA.Smith@fife.gov.uk

Risk Profiling

Background

Health and Safety risk profiling supports and complements the risk management and risk assessment processes by ensuring that significant health and safety risk issues are effectively identified, prioritised, managed, and resourced.

Although health and safety risk assessment has been in place for many years, risk profiling provides an additional level of overview and ensures further engagement with employees which supports a positive health and safety culture.

The risk profiling process is key to senior managers with responsibility for discharging Section 3.1 of Part 2 of the Council's Health and Safety Management Framework.

The process involves the Senior Manager / Manager responsible for the employees, engaging with employees who may be at risk whilst carrying out work activities. The corporate team H&S Advisors are actively working within directorates to guide them and ensure that they have completed their risk profiling process.

Progress Update:

Communities - Complete

Summary report prepared and issued for consideration by the Directorate and preparation of actions plans.

Education and Children and Families

Last year significant progress was made within Education. Pupil Support Service (PSS) will follow the general primary or general secondary school profile depending on the setting. Due to COVID19 priorities the progress has been slowed down significantly. It is expected that the exercise will be completed later in 2022. Areas still to be looked at are the social work services within the directorate - Children and Families and Criminal Justice Services.

Enterprise and Environment

The HSW team will be engaging all Services within E&E later in 2022 to confirm the status of risk profiling within the Directorate. Some work was undertaken pre-covid which will be reviewed to ensure currency.

Finance and Corporate Services - Complete

Summary report prepared and issued pre-pandemic. The nominated H&S Adviser will assist the directorate to review currency and requirement for actions plans.

Health and Social Care - Complete

A summary report being prepared and will be issued for consideration by the Directorate and preparation of actions plans.

Further Information

Report prepared by: Susan Harris , Health and Safety Lead Officer
Email: Susan.Harris@fife.gov.uk

3rd November 2022

Agenda Item No. 11

Annual Procurement Report 2021-2022

Report by: Les Robertson, Head of Revenue and Commercial Services

Wards Affected: All

Purpose

The purpose of this report is to provide members with a summary of Procurement activity and its impact during the financial year 2021/2022.

Recommendation(s)

Members are asked to note the content of the Annual Procurement Report (Appendix 1) which will subsequently be published online and notified to Scottish Ministers.

Resource Implications

There are no direct resource implications resulting from this report, however, trend data detailed in the report highlights the increased demand on the Procurement function.

Legal & Risk Implications

The Annual Procurement Report is a requirement of the Procurement Reform (Scotland) Act 2014 and is intended to support transparency and compliance with the Act.

Impact Assessment

An Equality Impact Assessment (EqIA) is not required as there are no changes to existing service delivery and policy.

Consultation

Consultation is not required as part of this report, but content has been shared with relevant stakeholders for input and comment as appropriate.

1.0 Background

- 1.1 The Procurement Reform (Scotland) Act 2014 forms part of the public procurement legislation that governs how Scottish public bodies buy their goods, works and services and encourages the maximising of economic benefit brought to Scotland from effective and efficient public procurement activity.
- 1.2 The Act requires public bodies to publish procurement strategies to set out how they intend to carry out their regulated procurements and publish Annual Procurement Reports. The Annual Procurement Report is attached in Appendix 1 and is required to be published on the internet with the link then sent on to Scottish Ministers.
- 1.3 The Annual Procurement Report requires set criteria to be included as a minimum and it should be enhanced to include any content in relation to the specific organisation's Procurement Strategy. Areas such as Fair Work Practices and supporting the local economy are recognised priorities of Fife Council therefore these have been incorporated into the report.
- 1.4 It is acknowledged that the Annual Procurement Report is lengthy, with extensive data provided, including multiple line appendices. As noted in 1.3, much of the content is required to comply with Statutory Guidance and is of interest or benefit to different audiences.
- 1.5 The reporting period that the report addresses is the respective financial year 2021-2022, i.e. 1st April 2021 through to 31st March 2022.

2.0 Reporting Period Highlights

- 2.1 The Annual Procurement Report acknowledges that the Council had in excess of £500m 'in-scope' third party spend over the reporting period. Almost 77% of this spend is with Scottish based organisations.
- 2.2 Over and above the statutory reporting, further detail has been included to provide some more qualitative and quantitative detail to report on specific commitments and objectives from the Council's current [Procurement & Commercial Strategy](#).
- 2.3 £7.984m of financial benefits have been generated during the reporting period with over £4m of these being cashable. A summary of benefits for the last three years has been provided to show comparison and that the collective benefit generated over that period is in excess of £20m.
- 2.4 In addition to the financial savings, other benefits from procurement activity have been reported, including:
 - Ensuring as much of Fife Council's procurement spend is spent with local Fife businesses as possible.
 - Reduction of environmental impacts
 - Delivery of Community Benefits from contracted suppliers
 - Promoting Fair Work practices in procurement activity.

Sustainable Procurement – spend with local Fife Businesses/SMEs

- 2.5.1 As well as the statutory requirement to achieve best value in every contract issued by Fife Council, there is a policy objective to obtain the best outcomes for the wider Fife economy and this is supported by targeting procurement spend to local Fife businesses, especially the small to medium enterprise (SME – under 250 employees) sector.

- 2.5.2 Fife Council attributed 41.7% of its third party spend to Fife businesses. This is a year on year increase from prior years, and Section 6.5 of Appendix 1 illustrates the position and also notes that 76.9% of the spend was with Scottish based businesses.
- 2.5.3 50.5% of spend was with organisations categorised as being an SME, and 28.4% of the spend was with Fife based SMEs.
- 2.5.4 Fife Council remains an active participant in the Supplier Development Programme helping support local SMEs in their capability in participating in the tender process. Section 6.8 of the Annual Procurement Report provides detail of this involvement.
- 2.5.5 Scotland Excel manage a portfolio of national frameworks for the local authority sector to use. Over the reporting period, there were 35 local suppliers on 24 Scotland Excel frameworks which also provides wider opportunity for these suppliers to supply other local authorities. Collective spend with Fife suppliers through these frameworks was £25.34m, and £5.32m of this was spend from Fife Council.

Sustainable Procurement – Climate/Reduction of Environmental Impacts

- 2.6 Sustainable procurement aspects are incorporated into tender processes and through ongoing contract management as applicable. Some examples of this activity is provided in Section 8 of the Annual Procurement Report.

Sustainable Procurement – Community Benefits

- 2.7.1 Community benefits are one of a range of social and environmental considerations that can be included in public contracts and frameworks.
- 2.7.2 Community benefits should always be relevant and proportionate to the contract in question and there is a statutory duty to consider inclusion of such criteria for all procurement exercises above £4m. It is Fife’s policy to also consider at lower levels in a relevant and proportionate manner.
- 2.7.3 Fife Council contracts have generated significant and varied community benefits ranging from jobs, apprenticeships, work-placements and training to sub-contract/supply chain benefits, social value rebates and donations etc. Further detail on benefits delivered are provided in Section 9 of the report, and its associated Appendix (Appendix 1B).

Fair Work Practices

- 2.8.1 Fife Council remain committed to encouraging contractors to adopt fair work practices and attempt to ensure that payment of a fair wage is provided to relevant employees in its contractual activity.
- 2.8.2 Fair work criteria was included in 130 contracts and 203 suppliers have committed to paying the Real Living Wage in delivery of those contracts. 52 of the suppliers awarded a regulated contract during the reporting period are accredited Real Living Wage employers.
- 2.8.3 Fife Council also promote fair work practices through seeking commitment to our Construction Charter and Ethical Care Charter in appropriate contracts. As part of these commitments, the procurement teams have had no concern raised or any evidence of blacklisting occurring in their contracts.

Other notable milestones/achievements and improvement activity

- 2.9.1 The Annual Procurement Report provides a summary of achievements which demonstrates the continued progressive journey of the procurement team and function.

Annual review of Procurement and Commercial Strategy

- 2.10.1 The Procurement Reform (Scotland) Act 2014 requires contracting authorities to review its procurement strategy annually. This report provides a mechanism to report on its review which is conducted to assess whether the procurement activity and priorities remain in alignment to the council's broader priorities.
- 2.10.2 The review concluded that commitments and priorities all remained relevant, albeit due to prevalent risks and impacts, there is acknowledgement that some areas will require increased focus to support the council's broader objectives as follows:
- Supply Chain Impacts
 - Financial Savings/Benefits
 - Supporting Local Businesses, SMEs and Third Sector

Other Priorities Moving Forward

- 2.11.1 In acknowledgement of the above areas, and in recognition of the progressive journey of the procurement function, other priorities moving forward have been identified and detailed in the report. These include areas such as supporting the council's reform agenda, both in terms of Community Wealth Building and Addressing the Climate Emergency.
- 2.11.2 In addition to the above, continuous improvement activity of the procurement function remains a priority (and is in alignment with national 'Public Procurement Priorities'), which includes resource planning and a review of the Council's Scheme of Tender Procedures.

3.0 Conclusions

- 3.1 Procurement activity has delivered £7.984m in savings and benefits in the financial year of 2021-2022.
- 3.2 In addition to the financial benefits listed, Procurement has also achieved non-financial benefits in the form of community benefits as detailed in the Annual Procurement Report (Appendix 1 (Appendix 1B)) as well as committing to drive the fair work practices agenda and activity in relation to supporting sustainability related projects.
- 3.3 Fife Council has a significant spend being retained within the local Fife Economy.
- 3.4 A number of achievements and improvement activity has occurred and reported on.
- 3.5 A reflection of current strategy and current risks, issues present, and areas of increased focus for the procurement function have been identified. Updates on progress of these priorities and opportunities shall be reported in subsequent years' Annual Procurement Reports as applicable.

List of Appendices

1. Appendix 1 Fife Council Annual Procurement Report, including subsequent appendices:

[Appendix 1A](#)

[Appendix 1B](#)

[Appendix 1C](#)

[Annex A \(Scottish Government Return\)](#)

Background Papers

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

1. [Fife Council Procurement & Commercial Strategy 2019-2024](#)
2. [Procurement Reform \(Scotland\) Act 2014: Statutory Guidance](#)
3. [Public procurement: annual procurement reports for 2021 - 2022 - revised procurement strategies and notifying Scottish Ministers: SPPN 5/2022](#)
4. [Public procurement: priorities 2021 to March 2024](#)
5. 2022/23 Internal Audit Plan (Standards and Audit Committee, 19th April 2022)

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Annual Procurement Report

1st April 2021 – 31st March 2022



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Section 1 – Introduction and Purpose

Fife Council is the third largest local authority in Scotland, with an annual third party spend in excess of £500 million and is responsible for delivering all local government services in the Kingdom. It is acknowledged that we are living in very challenging times and we aim to ensure all procurement activity provides best value to the council. We recognise this is not just about cost and quality, but about the best balance of cost, quality and sustainability.

Fife Council is a public sector contracting authority and as such is required to produce an Annual Procurement Report detailing all of its regulated procurement activity. This report summarises the council's regulated procurement activity throughout 2021/2022. A regulated procurement is any procurement for public supplies or services with a value of over £50,000 and for public works with a value of over £2 million.

This report has been prepared as the Annual Procurement Report for the period of financial year 2021/22, to meet the requirements of the Procurement Reform (Scotland) Act 2014 whereby all councils who are required to prepare a procurement strategy must also prepare an annual report on the regulated procurements completed during that year.

Section 2 – Context

2.1 Procurement & Commercial Strategy

In January 2019, Fife Council's Policy and Co-ordination Committee approved a five-year Procurement & Commercial Strategy for implementation in April 2019. This strategy was prepared to reflect current legislation as well as committed policies of Fife Council, it also stretches the procurement function to help meet some wider aims and objectives of the Council.

The aspirations set out in the strategy are ambitious yet reflective of the journey that Fife Council and the procurement function has been (and continues to be) on.

This Annual Procurement Report presents performance and progress against policy objectives as well as mandatory reporting elements as dictated by the Procurement Reform (Scotland) Act 2014. This and previous year's Annual Procurement Reports reflect mandatory reporting elements as well as recognised Fife Council priorities.

Our **vision** for the Fife Council procurement team is as follows:

A professional procurement service providing an expert strategic and solution-based service which utilises a commercial focus by collaborating with stakeholders and markets, to achieve best value by improving delivery of services and contributing to the Fife economy.

2.2 Procurement in Fife Council

The Procurement function is part of Revenue and Commercial Services and is an 'enabling' support service, within the Council's Finance and Corporate Services Directorate.

The operating model for Procurement is a part-centralised function with a strategic focus on the generation of financial and non-financial benefits, effective supplier management, robust demand challenge, compliance, fraud prevention, and continuous improvement.

The Procurement function utilises a category management approach with a structured sourcing programme. Categories of spend have been segmented into the following areas:

- Construction*
- Corporate & Facilities Management*
- Fleet, Plant, Hire & Environmental*
- ICT; Utilities; and Security
- Social Care
- Transportation & Travel

*Procurement activity is delegated to authorised individuals within the service area for construction works related activity and some Facilities Management services, however process guidance is provided by the central Procurement function and established governance is in place to aid consistency and compliance.

Section 3 – Format and Content

The undernoted sections provide the quantitative detail required as part of the statutory reporting, and where appropriate some additional narrative and qualitative information to supplement the content. There are some additional sections to report on Fife Council policy commitments as set out in the Procurement and Commercial Strategy.

It is noted that the formal reporting requires information on regulated activity, however it is sometimes difficult to separate regulated from non-regulated, therefore some figures and content refer to all formal procurement activity but presenting the information in this way provides a more accurate reflection of actual activity across the board.

Section 4 – Spend and Savings/Benefits Position

4.1 Snapshot – statutory reporting and context (Table 1)

Spend and Savings Summary	Source/Note	2021/22 £m/%
a) Total procurement spend for the period covered by the annual procurement report.	Oracle Accounts Payable Transactions Report (Spikes Cavell)	502.74
b) Total procurement spend with SMEs during the period covered by the annual procurement report.		254.08 (2322 suppliers)
c) Total procurement spend with Third sector bodies during the period covered by the report.		63.93 (243 suppliers)
d) Percentage of total procurement spend through collaborative contracts	Spend - Category A (Scottish Procurement)	27.78
	Spend - Category B (Scotland Excel)	38.43
	Spend - Other national/regional collaborative*	80.28
	Total	146.49
	Percentage	29%

*includes National Care Home Contract (via COSLA) and Crown Commercial Services (UK Government).

4.2 – Savings and Benefits

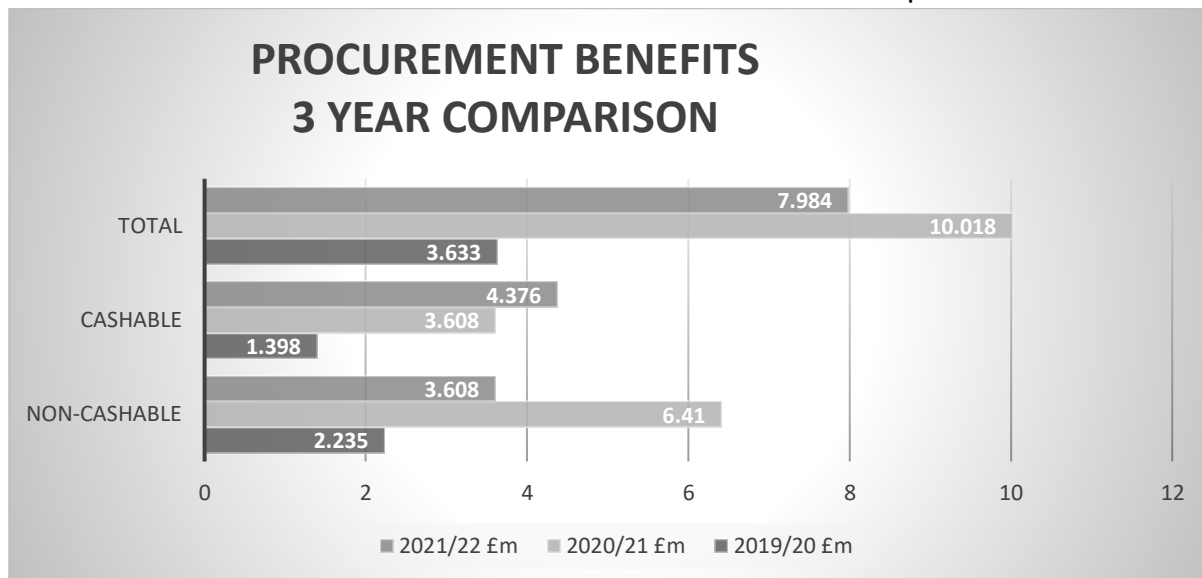
4.2.1 Procurement captures savings and benefits in accordance with a defined Benefits Realisation Policy. This policy is then applied by procurement staff recording benefits achieved on the benefits tracker spreadsheet which is then in turn verified by Finance before any benefits are deemed as made.

4.2.2 Procurement benefits for financial year 2021-2022 have been verified at £7.984m, as illustrated below (Figure 1):

Total Benefits					
2021-22 Procurement Benefits					
	Qtr 1 £m	Qtr2 £m	Qtr 3 £m	Qtr 4 £m	Total £m
Delivered	2.424	0.859	1.262	3.440	7.984
Cashable	1.911	0.662	0.686	1.116	4.376
Cost Avoidance	0.513	0.196	0.575	2.323	3.608

4.2.3 Within Figure 1, there will be multi-year contracts. The benefits will be recurring for the length of these contracts; therefore some benefits may have already been reported in previous years.

4.2.4 Figure 2 – Comparison of benefits reported over last 3 years illustrating in excess of £20m of benefits have been realised over that period.



4.2.5 It is noted that benefits were significantly higher in 2020/21. £5.1m of those benefits were in relation to COVID pandemic, i.e. cost avoidance in the form of reduction of construction claims, suspension of services including supplier relief claims as well as benchmarking of pricing of PPE.

Section 5 - Summary of Regulated Procurements Completed

Fife Council maintains a contract register which captures high level contract detail information in line with the requirements of procurement legislation, it also contains additional information that is captured to aid policy reporting.

The below table (Table 2) provides the statutory reporting detail on the procurement activity over the reporting period.

Total number of regulated contracts awarded within reporting period	140 regulated procurement exercises (385 contract awards (suppliers))
Total value of regulated contracts awarded within the report period	£410.75m
Total number of 'contracts' awarded via PCS <i>N.B. each supplier awarded to a contract is considered a contract, hence the higher figures</i>	567

Appendix 1A provides summary of regulated procurement activity as required for statutory reporting.

During the reporting period there were circa. 762 active contracts on the register – this does not include un-regulated one-off tender activity such as sub-contract packages. This figure is subject to change throughout the year but was representative of position in March 2022.

Section 6 – Local Businesses & SMEs

6.1 – Context and Approach

In relation to Scottish and Fife Council policy, there is a strong desire to support Small to Medium Enterprises (SMEs), particularly local companies and/or those within the supply chain. Additionally, Fife Council is a Living Wage Accredited employer which comes with obligations around making effort to encourage relevant contractors to pay the Real Living Wage as a minimum. For this reason, activity in these areas are specifically reported on in addition to the minimum expected content.

Whilst locality of organisations is easily identified (assuming only focussing on organisations with head office based locally), businesses who are trading as SMEs are not always categorised as such in data sources. This therefore makes accurate capture of this information difficult but is improving year on year.

It should also be noted that local businesses may benefit from non-local procurement spend either through depots/employment within the local authority area, or through their onward supply chain. It is not currently feasible to quantify this.

6.2 – Local Contracts Awarded

The below provides analysis of contracts awarded via Public Contracts Scotland (the national public sector procurement portal for advertising and awarding contracts). This portal is used for both regulated and unregulated procurement activity. The images below illustrate that 48% of contracts awarded are to businesses that are registered as trading from Fife.

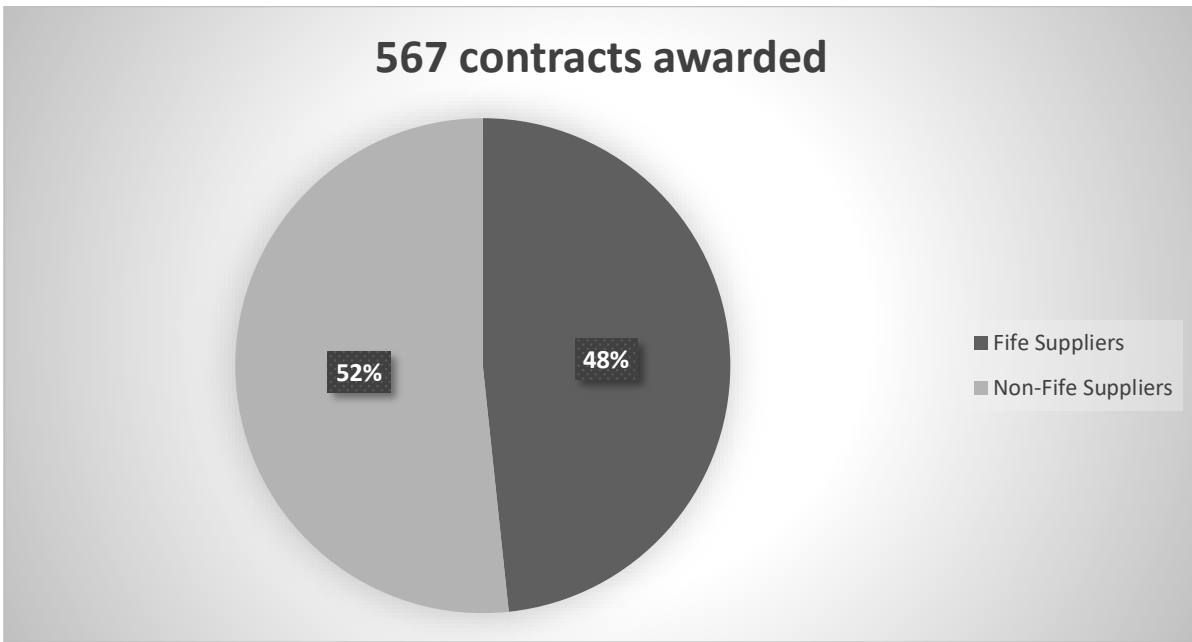


Figure 3 – analysis of PCS contract award notices 1st April 2021-31st March 2022

6.3 Small to Medium Enterprises (SMEs)

The chart below illustrates the contract awards in terms of the size of the organisation. 88% of contracts have been awarded to organisations from Micro size (1-9 employees), Small (10-49 employees) and Medium size (50-149 employees) Enterprises.

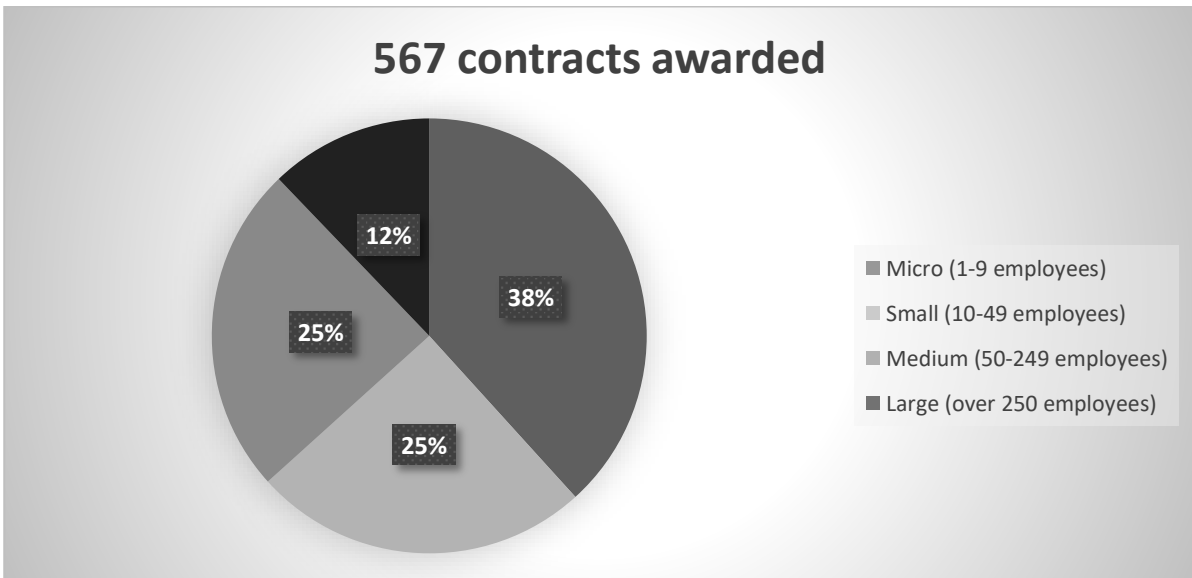


Figure 4 – SME Status per awarded contract, source PCS contract award notices 1st April 2021 - 31st March 2022.

6.4 Statutory Reporting (Table 3)

Regulated	
Number of unique suppliers across (140) regulated contracts	377
Number of (unique) suppliers awarded with contracts during reporting period that are SMEs	293 (78%)
Number of (unique) suppliers awarded with contracts during reported period that are Third Sector bodies	14

6.5 Fife Council Spend – local and SME status (Table 4)

	2021/22 £M	%
Total Fife Council Spend	502.74	
Total spend with suppliers based within Fife local authority boundary area	208.67	41.7
Total spend with SMEs (where SME status is known, i.e. out of £455.2m)	254.08	50.5
Total spend with Fife SMEs (where SME status is known, i.e. out of £455.2m)	142.74	28.4
*National Reporting methodology – Spikes Cavell (national public sector procurement tool) presents percentage of spend with SMEs against total spend where supplier size is known rather than overall spend. <i>SME spend where size of organisation is known = 254.1m</i> <i>Total spend where size of organisation is known = 455.2m</i>		55.8

6.5.1 Figure 5 - 3-year comparison



6.6 Spend Distribution by Location

Whilst the Reform and Recovery, Community Wealth Building agenda seeks to maximise procurement spend within its local area, it is recognised that Fife is already a high performer in that regard and strives for continuous improvement. However, it is often the case that organisations within the Scottish markets require multi-regional customer bases to make them sustainable, therefore it is never going to be feasible to have all spend within an individual local authority area. The undernoted table provides a breakdown of location of spend and illustrates that 76.9% of Fife Council's spend is with Scottish based organisations.

6.6.1 Table 5 Spend Distribution by location

Region (Scottish Definition)	Total Value (£)	Total (%)	Suppliers (Number)
Scotland - Tayside Central and Fife	228.05	45.6%	2289
Scotland - Glasgow and Strathclyde	70.80	14.2%	398
Scotland - Edinburgh and Lothians	41.40	8.3%	379
Scotland - Forth Valley	39.41	7.9%	112
Scotland - Aberdeen and North-East	2.52	0.5%	31
Scotland - South	1.06	0.2%	20
Scotland - Highlands and Islands	1.04	0.2%	31
Outwith Scotland	115.65	23.1%	1262

Source – Spikes Cavell



6.7 Scotland Excel – Local Supplier Reporting

Scotland Excel manage a portfolio of national frameworks for the local authority sector. Over the reporting period, there were 35 Fife based suppliers on 24 Scotland Excel frameworks (increase of 2 local suppliers from 2020/21). This also provides wider opportunity for these suppliers to supply out with Fife Boundaries. Collective spend with Fife suppliers through these frameworks was £25.34m. £5.32m of this spend was from Fife Council.



6.8 Supplier Development Programme

Fife Council, in conjunction with colleagues in Economic Development have active participation with the Supplier Development Programme (SDP).

The Supplier Development Programme working together with Local Authorities and other public bodies to provide business support in all aspects of tendering. By assisting

businesses to become tender ready for public procurement, all-round efficiency, sustainability, and market potential is improved.

Whilst Fife businesses can access this service and hopefully improve their chances of winning Fife Council business, this also enhances their opportunity to bid for business out with Fife to further strengthen their market position.

The below table (Table 6) provides figures of registration with the Programme as well as participation in Meet the Buyer events:

Council Area	Companies Registered in 2021/22	Total Companies Registered
Fife	84	1007
Number of Businesses Participating in SDP Events & Activities (2021/2022) <ul style="list-style-type: none"> - Meet the Buyer Fife (45) - Meet the Buyer National (18) - Meet the Buyer North (8) - Meet the Buyer Ayrshire (1) - Meet the Buyer Forth Valley (6) - Meet the Buyer Lanarkshire (1) - Virtual Surgeries (2) 		
Over the reporting period, Procurement representatives exhibited at the below events: <ul style="list-style-type: none"> - 8th June 2021 – Meet the Buyer National - 7th September 2021 – Meet the Buyer North - 4th November 2021 – Meet the Buyer Fife (Dunfermline Learning Campus and Levenmouth Railway Link Supply Chain Opportunities) - 22nd March 2022 – Fife and Tayside Virtual Surgeries 		

Section 7 – Summary of Regulated Procurement Compliance

Table 7

Number of regulated contracts awarded within the period that complied with Procurement Strategy (and/or Scheme of Tender Procedures)	139
Number of regulated contracts awarded within the period that did not comply with Procurement Strategy (and/or Scheme of Tender Procedures)	1

7.1 Out of the 140 contracts awarded, there were 19 direct awards during the reporting period, 18 of these were still considered compliant as were awarded in accordance with specific criteria in Fife Council's Scheme of Tender Procedures and/or the Procurement Regulations. 1 contract was let out with a framework as originally planned due to technicalities with the framework

conditions meaning this did not represent best value to Fife Council. Full detail was documented and approved within the internal Procurement governance arrangements.

7.2 Supplier Relief

7.2.1 COVID-19 has had a significant impact on businesses of all sizes, and due to restrictions imposed, many suppliers were unable to fulfil their contractual obligations. In many cases, the services were simply not required from the council due to the lockdown situation, therefore there was no impact in terms of service delivery, however, contractual payments therefore came into question. Whilst costs were already budgeted for, any such payments would be in breach of the Financial Regulations as would be payments for goods/services not received.

7.2.2 The Government recognised that suppliers' financial viability, ability to retain staff and their supply chain could be put at risk. A procurement policy note was issued (SPPN 05/2020 – Supplier Relief) requesting that public bodies should act to support their suppliers so that they are better able to cope with the crisis and resume normal service delivery and fulfil their contractual obligations when the outbreak is over. The note provided guidance on steps that could be taken to provide supplier relief under existing contracts.

7.2.3 Forms of supplier relief that can be considered/provided are as follows:

- Advance payment or advance interim payment for goods or services prior to delivery
- Amendment of contract deliverables such as performance/timescale etc.
- Continue payment notwithstanding reduced or non-performance
- Bring forward orders and associated payments

7.2.4 The scheme was administered by a sub-group of senior officers under delegated authority obtained from Policy and Coordination committee on 6th April 2020 (and extended authority at Fife Council meeting of 23rd September 2021). The remit of the group was to identify and apply supplier relief in accordance with Scottish Government Guidance.

7.2.5 The following table (Table 8) summarises the approvals of key supplier relief made for claims made for periods between 1st July 2021 up to 31st March 2022.

N.B Last year's Annual Procurement Report included relief decisions approved up to 30th June 2021

Table 8 – Supplier Relief Claim Approvals

Sector/Provider(s)	Type of Relief	Financial Value
Respite/Day Care	Payment notwithstanding reduced/non-performance	£0.58m

Section 8 – Sustainable Procurement Duty, Climate Duties

8.1 – Context (Public Sector Climate Change Duties)

- 8.1.1 Fife Council recognises its responsibility to carry out its procurement activities in an economically, environmental and socially responsible manner. Fife Council's Procurement Strategy includes a commitment to purchase goods, materials and services that minimise or reduce the impacts of its activities on the local and global environment, including whole life costing, energy efficiency, supply chain management and sustainably sourced products.
- 8.1.2 As part of fulfilment of the 'Public Sector Climate Change Duties', the Council has a duty to provide a return for its 'Public Bodies Duties Report' (PBDR). Procurement feed into this with responses to specific questions (Part 5 of the return), and an example of the content is provided in the following sections:
- 8.1.3 ***How have procurement policies contributed to compliance with climate change duties:***

Fife Council is a major procurer of goods and services within Fife. The embodied carbon of our up and downstream supply chain is likely to be a significant contributor to Fife-wide carbon emissions and to emissions further afield.

To assist in the reduction of these emissions and other environmental impacts of the Council's Procurement activities, Corporate Procurement continues to utilise the Scottish Government's 'Procurement Journey' guidance in terms of best practice. This includes considerations such as sustainability and climate change mitigation, and consideration and use of various tools that are provided to be utilised with the goods/services/works procurement activity.

The tools available that aid sustainable considerations include

- Flexible Framework assessment tool
- Prioritisation Tool
- Life Cycle Impact Mapping Tool
- Sustainability Test
- E – Learning modules

Mainstreaming these best practice principles into our procurement activities will contribute to our continual compliance with climate change duties.

Procurement is embedded within the Climate Fife Sustainable Energy and Climate Action Plan (2020–2030) and are represented across the eight key areas.

Fife Council shall consider/support:

- the use of whole life cost where appropriate.
- the use of Sustainable Procurement Duty Tools that aid the prioritisation of sustainability to achieve maximum benefits within all regulated procurements and also to prioritise and focus on those categories of spend that offer the greatest potential sustainable outcomes.
- the use of the Scottish Government Flexible Framework Self-Assessment Tool (FFSAT) to ascertain the level of performance of sustainable procurement across the Council. This tool will provide a clear action plan that will set out how, and by when, improvements in sustainable procurement will be made.
- The environmental impact of construction projects as appropriate, including a sustainability policy for design and construction.
- Encourage recycling and reuse of materials through waste management plans in order to minimise waste to landfill.
- The use of low energy equipment and environmentally friendly chemicals,
- Maximise use of materials from sustainable sources in accordance with government buying standards; and
- Support corporate initiatives/working groups in relation to the sustainability agenda where supplies/services are relevant and undertake any associated procurement activity, e.g. Food4Fife Partnership, Local Procurement Group and elimination of single use plastics.
- Continue to feed into and work with colleagues in the development of Climate Fife Sustainable Energy and Climate Action Plan (2020 – 2030) and in particular the areas directly affected by Procurement.

8.1.4 ***How has procurement activity contributed to compliance with climate change duties?***

Regulated procurement requires the consideration and application, where applicable and appropriate, of the Sustainable Procurement Duty in all procurements as per the Procurement Reform (Scotland) Regulations 2016 and the Public Contracts (Scotland) Regulations 2015. The Procurement Service works with Fife Council services to develop contract terms and procurement criteria. Procurement weightings are developed in negotiation between the procurement team and client services.

Client services can and do, consider direct and indirect carbon emissions (i.e., supply chain emissions, provenance, and manufacturing methods) within their procurement specifications, but these must be balanced against other procurement criteria so that the requirements are proportional and are not so specific as to effectively reduce options down to only one supplier as this could be seen as raising barriers to business.

Examples of procurement activities which have contributed to our compliance with climate change duties in the reporting year include (Table 9):

Description/Commitment	Examples/confirmation of compliance
Alternative Fuelled vehicles including Electric Vans and Pool Cars as part of the Council's Fleet Replacement Programme	Fife Council's fleet currently has 74 electric vehicles (55 are full electric and 19 hybrids).
Continued use of a collaborative framework to support the increase of the number of charge points allowing wider use of electric vehicles and positively contributing to our climate change commitment.	104 units currently in place (public and fleet) 2021 - 22 20 new units were installed and to date (2021 – 2022) there are 7 new units installed. A further 16 new units are scheduled for completion in 2022 - 23.
Heavy Goods Vehicles generally contain in excess of 90% recyclable materials which can be reclaimed at the end of the vehicle's life and the primary goal of the Euro VI (or latest Euro Engine) emissions standards is to reduce harmful emissions from vehicles	EURO 6 is the current standard and vehicles purchased must adhere to this. Scotland Excel Framework includes sustainable procurement within the technical section of the tender and a range of sustainable measures were outlined by suppliers including Fleet/environmental Standards Reducing carbon footprint Waste reduction Vehicle and waste prevention
LED lighting, LED street lighting and luminaires programmes have resulted in carbon and CO2 reductions.	Fife Council currently has 35,886 LED street lighting lanterns (approx. 52.8% of the network) and this is an increase of 917 since 2020 - 21. Energy consumption for unmetered street lighting including lit signs, bollards and traffic signals was: - 2021 - 22 = 9,207,443 kwh 2021 - 22 = 9,043,204 kwh This is a reduction of 164,239 kwh and approximately 241 tonnes of CO2.

Construction projects to be designed and constructed to be 'Net Zero' which will incorporate sustainable features which will reduce energy consumption and carbon emissions.	Dunfermline Learning Campus is being constructed to 'Passivhaus' standards/certification which will assist the Council in reducing energy consumption and carbon emissions. Project us working towards Net Zero.
All vehicles used on bus contracts must not be older than 20 years and must be manufactured on or after 1 October 2000. All taxi contracts use vehicles in line with the Council's Licensing requirements (no older than 10-12 years old). Minibuses must be no older than 15 years old.	Transport contracts (160 + Taxis, Bus and Coach) require membership of the ECO Stars Fleet Recognition Scheme. Ongoing discussions with Contractors, the Climate Change Team and ECO Stars to seek ways in which Fife Council can strengthen the Council's commitments in future tender requirements. Focus will be mainly on minimum Euro emission standards, increased percentage of quality scoring devoted to environmental aspects and the use of Eco Star ratings as a scored quality criterion.
Contracts must provide Fife Council with copies of declarations of conformity or conformity certificates.	Timber contracts requirements - Ability to provide detail for chain of custody and certification on advice notes and invoices for materials.

Note - this list presents an illustrative sample of Fife Council contracts where procurement activity sought to reduce emissions as part of the procurement criteria and is not necessarily exhaustive.

Other examples of corporate Sustainable Procurement support and ongoing work includes: -

- Continuing the promotion of the Scottish Government's Sustainable Procurement Toolkit within all Fife Council procuring areas.
- Promotion of Sustainable Procurement e-learning modules within Corporate Procurement and other Fife Council Delegated Procuring Areas (DPA) and continuing to explore options with the Sustainability Team colleagues in relation to combining the Sustainable Procurement e-learning and Climate Literacy e-learning.
- Focus on payment of Real Living Wage and Fair Work Practices.

8.2 Single Use Plastics

8.2.1 The commitment to support the elimination of single use plastics within Fife Council has continued, albeit there have been challenges resulting from the pandemic impacting on the programme.

8.2.2 Procurement provides the management information to maintain the Single Use Plastics Register to support this work.

Section 9 – Community Benefits

9.1 – Context and Approach

9.1.1 Fife Council recognises that public procurement contracts can help realise a wide range of social and environmental benefits, including more and better employment opportunities.

9.1.2 Community benefits can help contribute to local and national outcomes relating to employability, skills and the reduction of inequality.

9.1.3 In the context of the Procurement Reform (Scotland) Act 2014, a community benefit requirement is a contractual requirement imposed by a contracting authority –

(a) Relating to:

(i) Training and recruitment

(ii) The availability of sub-contract opportunities, or

(b) Which is otherwise intended to improve the economic, social or environmental wellbeing of the authority's area in a way additional to the main purpose of the contract in which the requirement is included.

9.1.4 Community Benefit Clauses (CBCs) are clauses within contracts requiring tenderers to commit to undertaking some form of social benefit as part of the contract. These clauses are aimed at tackling issues in training, employment, economic regeneration and the environment through investment in local communities.

9.1.5 For major works projects, Fife Council committed to:

- Due consideration of whether to impose community benefit requirements as part of the procurement and if so, provide a summary of what it intends to include, and if not, provide a justification of why not deemed appropriate. Where included, Fife Council will include in the award notice a statement of the benefits it considers will be derived from those requirements.

9.1.6 The above is a mandatory requirement in accordance with the Procurement Reform (Scotland) Act 2014, however Fife Council's policy goes beyond the minimum requirement and gives consideration of community benefits for goods/services contracts as well as major works projects, where deemed proportionate and relevant to do so.

9.2 Statutory Reporting

9.2.1 Table 10

Total number of regulated contracts awarded with a value of £4m or greater		23
Total number of regulated contracts awarded with a value of £4m or greater that contain Community Benefit requirements		6
Total number of regulated contracts awarded with a value of less than £4m that contain Community Benefit requirements		29
Community Benefit Type	No.	£ value (where quantified)
Number of jobs	67.82	£190,410
Number of apprenticeships	138.14	£51,599
Number of work placements	529	£66,327
Number of qualifications achieved through training	1	N/A
Other community benefit(s) fulfilled such as:		
<ul style="list-style-type: none"> SME and third sector spend (sub-contract/supply chain) 	1.57	£223,282
<ul style="list-style-type: none"> Social Value Rebate (including donations, charitable work etc.) 	2	£8,838
<ul style="list-style-type: none"> Environmental & Ethical 	N/A	N/A
<ul style="list-style-type: none"> Skills and Training (Workshops, Careers advice etc.) 	150	N/A
Total	889.53	£540,456
<p>In some cases, in the above and in <u>Appendix 1B</u> some entries do not contain either individual details (people) or financial values (£s). Some entries are valued in weeks i.e. Skill and Training.</p> <p>Benefits not delivered in 2021–22 but identified will be expected to be delivered in subsequent years of the contract duration.</p>		

9.2.2 Appendix 1B provides summary detail of community benefits recorded as delivered over the reporting period.

Section 10 – Fair Work and Real Living Wage

10.1 – Context and Approach

10.1.1 With a view to supporting the strategic aim of providing *Opportunities for all*, Fife Council considers payment of the Real Living Wage to be a significant indicator of an employer’s commitment to fair work practices and that payment of the Real Living Wage is one of the clearest ways that an employer can demonstrate that it takes a positive approach to its workforce.

10.1.2 The Council considers ‘workforce matters’ in connection with their contracts if the services provided have the effect of employees being considered an indirect employee of Fife Council and/or if there is known or perceived history of unfair work practices.

10.2 – Position/Statutory Reporting (Table 11)

Number of regulated contracts awarded during the period that have included a scored Fair Work criterion.	130
Number of unique suppliers who have committed to pay the Real Living Wage in the delivery of a regulated contract awarded during the period.	203
Number of unique suppliers who are accredited Living Wage employers and were awarded a regulated contract awarded during the period.	52
Number of unique suppliers who have signed up to the <u>Scottish Business Pledge</u> and were awarded a regulated contract during the period	11

10.3 – Other Council Commitments

10.3.1 As part of the Procurement & Commercial Strategy, Fair Work is further promoted within procurement activity by seeking commitment to our Construction Charter and Ethical Care Charter where applicable.

10.3.2 The Construction Charter is included in relevant construction related contracts to acknowledge the council aspiration and expectations for contractors to practice in their organisation also. The strategy also acknowledges that the council is opposed to blacklisting, and there is no evidence that any of our contractors practice blacklisting.

10.3.3 Similarly, the Ethical Care Charter is incorporated into relevant procurement exercises for homecare related services.

Section 11 – Invoice Payment Performance

11.1 – Context

11.1.1 Fife Council is committed to ensuring that businesses are paid on time because it is understood how important it is to pay businesses promptly once a service has been performed or goods delivered. Late payment is particularly detrimental to SMEs, third sector bodies and supported businesses. Fife Council also mandates via contract conditions that main contractors must pay their sub-contractors and suppliers promptly in an effort to ensure cashflow is positive throughout the supply chain.

11.1.2 Late payment legislation places a statutory duty on all public bodies to pay commercial debt within 30 days. Legislation also allows businesses to claim interest and recovery costs if goods and services are not paid for on time.

11.2 – Position

313,850 invoices have been received during the reporting period, and 294,504 (93.8%) of these were paid within 30 days.

11.3 – Supplier Portal

11.3.1 The Fife Council Oracle system has a Supplier Portal. This functionality allows suppliers to have their own unique login to their account details within the Council's system and the ability to review order, payment and catalogue status/details. Some suppliers use this functionality to create their own invoices via the system, which when matched to an existing order and matched receipt, will automatically pay. This creates efficiency for the council as the invoice does not need to be handled in any manner by council personnel (unless there is a mismatch).

11.3.2 During the reporting period, 69 suppliers submitted 19,721 invoices that were processed via this method.

11.4 – eInvoices

11.4.1 Fife Council utilises the Scottish Government's eInvoicing solution which provides a platform that accepts a range of invoice formats that can be automatically processed for matching and payment. It is intended to provide an easy, consistent and standard platform for suppliers to the public sector and is compliant with relevant Directive requirements. There are no costs and should be no technology changes for suppliers to issue invoices through the system.

11.4.2 During the reporting period, 16,202 eInvoices have been processed via this method.

Section 12 – Supported Businesses

12.1 – Context and Approach

12.1.1 Before carrying out a regulated procurement, Fife Council includes consideration of how the process can facilitate the involvement of Supported Businesses. The involvement of Supported Businesses is considered at strategy stage. Completion of contract strategies are mandatory for all regulated procurement exercises; therefore, effort is made to consider supported businesses in all regulated procurements.

12.1.2 During the reporting period, 2 significant contracts were awarded to Fife's Supported Business, Matrix Fife as follows:

Table 12

Contract Description	Total Contract Value (Approx.)
Refurbishment and Hygienic Cleaning of Medical Aids	£495,564
Furniture and Furnishings for New Care Homes	£120,388

12.2 – Spend with Supported Businesses

Table 13

Supported Business	2021/22
Dovetail Enterprises	£147,188
Matrix Fife	£193,162
The Lady Haig's Poppy Factory	£4,085
Total spend with Supported Businesses	£344,435

Section 13 – Pipeline

Table 14

Total number of regulated procurements expected to commence in the next two financial years	274
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*(as of October 2022) NB, this is subject to change and refreshed 'Pipeline' is published on fife.gov website regularly.

Appendix 1C provides the Pipeline of procurements expected to commence in the next two financial years. Note this is continually updated and available publicly on the Fife Council website.

Section 14 – Milestones/Achievements and Improvement Activity

14.1 Context

14.1.1 Over the reporting period there has been a number of milestones and improvements including the following:

- Successful closure of the Commercialisation Programme with 2 main outcomes delivered. (Final Progress Report was presented to the Environment, Finance & Communities Scrutiny Committee on 2nd November 2021).
- Continued delivery of significant procurement benefits reported.
- Ongoing monitoring and pro-active activity associated with supply chain disruption and pricing volatility to minimise impacts to Council services. This has included significant additional procurement activity to resolve in areas such as Transportation with the need to manage unprecedented driver shortages and contractors ceasing trading. In addition, efforts made to minimise supply chain disruption to construction programmes of

work through increased collaborative working, forward planning and agile responses by internal services and supply base.

- Continued review of Supplier Relief Scheme and subsequent formal closure of the scheme with due diligence checks undertaken as well as remobilisation of services as applicable.
- Held a workshop on Protecting Vulnerable Groups (PVG) for procurement staff to ensure adequate safeguards are built-in to all Council contracts.
- Working with CoSLA on establishment of a national specification for Secure Care Transport.
- Focus on compliance issues, in areas such as transport, Social Care and Corporate/FM as well as the increased visibility of third party external spend and consistency brought to procurement governance within construction areas.

14.2 Internal Audits & Counter-Fraud in relation to Procurement Activity

14.2.1 Over the reporting period, there has been one Internal Audit/Fraud Risk Review carried out that were linked to procurement activity, and this was a review of the Replacement Bathroom & Shower Installations Framework. Enterprise & Environment – Replacement Bathroom & Shower Installations Framework, no evidence to suggest impropriety, but there were three recommendations for improvement to processes.

14.2.2 There continues to be a close relationship with the Council's Corporate Fraud Team, with instances of suspected fraud/corruption and irregularity being referred to the Team for investigation as and when appropriate. The Corporate Fraud Team also provides advice and guidance, and shares relevant intelligence from national groups/the wider public sector, with a view to mitigating the risk of fraud/corruption and irregularity.

14.2.3 Engagement with Internal Audit was conducted as part of stakeholder consultation exercise to help inform the 2022/23 Internal Audit Plan. Planned audit activity which might have a procurement involvement is as follows:

- Care in the Home (Contracts with, and payments to, Care providers for clients' care in the home.
- Procurement Cards (Corporate review of the internal controls in place to manage and monitor the use of procurement cards, including the authorisation of card transactions.)
- Purchase Ordering (Review of the requisition, approval and ordering arrangements in place within Oracle for non-contract spend below £5,000.)

14.2.4 Procurement will also assist with any involvement of other audit activity, including any unplanned work in audit/fraud investigation as necessary.

Section 15 – Annual Review of Procurement & Commercial Strategy

- 15.1 The Procurement Reform (Scotland) Act 2014 requires contracting authorities to review its procurement strategy annually. This report provides a mechanism to report on its review which is conducted to assess whether the procurement activity and priorities remain in alignment to the council's broader priorities.
- 15.2 The review concluded that the commitments and priorities all remained relevant, however due to prevalent risks and impacts, there is acknowledgement that some areas will require increased focus to support the council (and Scotland)'s broader objectives as follows:
- 15.3 **Supply Chain Impacts** - Continued monitoring and proactive activity to manage emerging/known impacts of multiple disruptions to supply chains.
- 15.4 **Financial Savings/Benefits**
- 15.4.1 Budget pressures remain a significant challenge for Fife Council. Any identified opportunities around efficiencies relating to third party spend will continue to be pursued.
- 15.4.2 An 'Opportunities Pipeline' is maintained within the Procurement team, where potential opportunities are logged and progressed accordingly. There is currently £4.131m worth of potential opportunities identified on this pipeline.
- 15.4.3 As a result of continued inflation rises, it is recognised that cost reduction on a like for like basis is unlikely to be achieved, and whilst any opportunities for financial savings shall be pursued, efforts will be focussed on minimising price impacts and keeping abreast of market conditions.
- 15.4.4 Consideration shall also be given on inclusion of a Public Sector Rebate where deemed appropriate to generate income for the Council.
- 15.5 **Supporting Local Businesses, SMEs and Third Sector** - Due to the local economic impact of external events (COVID-19 pandemic and other geopolitical events), it is recognised that procurement has a part to play in supporting economic recovery. This is addressed further in 'Priorities moving forward' section below.

Section 16 – Other Priorities/Moving Forward

16.1 'Buy Local', Community Wealth Building

- 16.1.1 The council has committed to developing a community wealth building agenda in Fife with a focus on strategies in relation to an inclusive growth economy and community-led delivery.

16.1.2 Procurement features as one of the five main strands of this work, termed 'Progressive Procurement'.

16.1.3 Progressive procurement of goods and services is a means through which benefits can be achieved for local people and place.

1. Identify opportunities to increase the supply chain of local enterprises to enable increased local spend to create jobs, contributing to a multiplier effect which in turn creates additional jobs via increased demand for local goods and services.
2. Review the Fife elements of the national Supplier Development Programme to support increased capacity for delivery of local supply chain opportunities.

16.1.4 The second strand 'Fair Employment and Just Labour Markets' is also relevant in procurement activity in relation to our approach with Fair Work in relevant tender exercises. Following updated guidance from Scottish Government, mandating of payment of the Real Living Wage is incorporated into procurement activity where feasible to do so.

16.1.5 The ultimate aim is to ensure that Community Wealth Building is embedded into procurement process as a key driver of purchasing decisions, within a legal framework.

16.1.6 Procurement is committed to support this work and is actively involved in the applicable reform groups and Boards as appropriate.

16.1.7 As part of the Progressive Procurement strand, we are continuing to develop the Councils approach to the consideration of Community Benefits within both regulated and non-regulated procurement activity and this includes: -

- Corporate Procurement representation on Local Procurement Group and formal governance groups for the reform work.
- Corporate Procurement representation on Food4Fife Partnership and the Fife Food Procurement Working Groups. The Food4Fife Partnership will progress Fife's food vision, food partnership, and food strategy.
- Continuing engagement with Economic Development and support of national, regional and local Meet the Buyer Events
- Continuing the use of a Community Benefits recording system (Cenefits)
- Representation on the Dunfermline Learning Campus project's Community Benefits Working Group
- Consideration of training and development needs in relation to Sustainable Procurement.
- Consider opportunity around a front-end portal for community groups to express their needs where there may be opportunity for these to be met via a community benefit from a public sector contract. Similarly, this could provide a platform for suppliers (current and perspective) to identify options/matches for community benefits that they could potentially deliver.

16.2 Supporting the Climate Emergency Reform Activity

16.2.1 Fife Council's Corporate Procurement is working with climate change colleagues to contribute to the Addressing the Climate Emergency (ACE) Action Plan in relation to sustainable procurement. The action plan includes consideration of:

- Passenger Transport (inclusion of decarbonisation and environmental management practices in bus and coach contracts, and revised approach to inclusion of community benefits).
- Food Procurement
- Levenmouth Circular Economy
- Employee Training
- Establishing links between the ACE Board and Community Wealth Building
- Investigating methods of measuring Scope 3 CO2 emissions from procurement activity with Fife Council climate colleagues and other procuring partners i.e. Fife College, NHS Fife and St. Andrews University

16.2.2 Food Fife Partnership Projects

Fife Council's Corporate Procurement is continuing to be represented on the Food Fife Partnership and is working with internal Council colleagues and Fife partners, specifically procurement, to draft a Food Procurement Strategy.

16.2.3 Fife Council's Corporate Procurement is working with internal colleagues to co-ordinate local food pilots to enhance and encourage both producers and distributors to engage with Fife Council to supply locally sourced/produced to the pilot areas.

16.3 Continuous Improvement/Team Development

16.3.1 Development of the procurement team will continue, through formal training/development such as use of Scotland Excel's Academy (individual workshops and/or CIPS/other accredited learning) and continued knowledge transfer efforts. This will be structured through a competency review framework (national Procurement Development Framework) as well as use of the corporate 'Our People Matter' approach.

16.3.2 There is also a need to review the form of contract used for applicable building and engineering contracts. Options around the purchase of licences and associated training for the latest suite of NEC (New Engineering Contracts), i.e. NEC4 shall be considered.

16.3.3 Discussion with key areas/stakeholders in the Council and applicable Trusts shall be had with a view to reviewing processes and procedures in terms of procurement activity to ensure it is in accordance with legislation and best practice, for example through the Town Centre Capital Delivery Group, Fife Coast & Countryside Trust, and Fife Historic Buildings Trust.

16.3.4 From a process point of view, it is intended that some current processes be reviewed to ensure practice is maximising the intended benefit, such as the following:

- Prompt Payment
- Fair Work First (including mandate of payment of the Real Living Wage in appropriate contracts).
- Procurement Governance – review of Summary Report template, Evaluation Forms and Procurement Review Board approach etc.
- Cyber Security in Contracts
- Fraud & Serious Organised Crime
- Public Sector Rebates
- Review of Terms and Conditions of Contract (corporate and sector specific, e.g. ICT and Social Care).

16.4 National Approach/Issues

16.4.1 The Public Procurement Group has agreed a set of priorities, high level aims and aspiration delivery statements for all public procurement leaders in Scotland – the ‘Public Procurement Priorities’. These demonstrate commitment to using the power of procurement to deliver and influence outcomes that are good for the people of Scotland. They also support the commitments set out in the government’s National Performance Framework, the Programme for Scotland and the national Economic Recovery Implementation Plan.

16.4.2 The Public Procurement Priorities are as follows:

- Leadership and Visibility
- Sustainable Economic Recovery
- Supply Chain Resilience (Public Sector)
- Maximise the Impact of the Sustainable Procurement Duty
- Climate Emergency
- Achieving Professional Excellence
- Using Systems to Drive Sustainable Outcomes and Support Reporting

16.4.3 Whilst the principles of these priorities by in large already feature in the Procurement and Commercial Strategy, these are not articulated explicitly as such. It is presumed that progress against these priorities will be expected to be reported in future years, therefore consideration of an action plan to supplement the strategy will be had.

16.4.4 National Care Service

Procurement shall continue to input to discussions and implement actions in relation to the National Care Service as appropriate.

16.4.5 Covid-19 Inquiry

Procurement shall assist with the national inquiry as required.

16.4.6 In addition, given the closure of the Supplier Relief Scheme, and subsequent due diligence undertaken to ensure payments were used in accordance with set conditions, a closure report will be presented to the (now disbanded) Welfare Sub-Group to confirm output/conclusions of this review, and any onward decision/activity required thereafter.

16.5 Procurement Structure/Delegated Procurement Authority

16.5.1 A review of the Procurement team structure is required to ensure it remains fit for purpose to deliver its strategic objectives and operational statutory requirements. It is aimed to have this reviewed for implementation in the next financial year. Consideration of succession planning and talent growth will form part of these plans.

16.5.2 Established governance and ongoing collaborative working with the Delegate Procuring areas shall continue to ensure compliance as well as alignment of processes and strategy.

16.5.3 There is also a need to complete a gap analysis and agree roles and responsibilities around Contract & Supplier Management between Procurement and the Health & Social Care Partnership.

16.6 Review/Update Scheme of Tender Procedures

The Scheme of Tender Procedures are subject to a review every 3 years. Whilst reviews have been undertaken routinely throughout the last 3 years, there will be a formal review of the content and any revision will be presented to Fife Council for consideration in accordance with the Council Standing Orders.

16.7 Technology in Procurement

16.7.1 Oracle Cloud/Procure to Pay (P2P) Processes

Given the investment in the Oracle Cloud system, it is important to ensure that the functionality is used to its full potential and that efficiencies are maximised. Focused effort will be made in conjunction with the Business Management Innovation Unit to continue this work.

In addition to efficiencies, any risk management capabilities using technology will be explored in an effort to combat any opportunity for procurement related fraud activity.

16.7.2 Power BI/other solutions

Despite the Oracle Cloud system providing strong data in terms of spend activity, due to the qualitative aspects of reporting in procurement activity, many spreadsheets require to be maintained – Contract Register, Pipeline, Benefits Tracker to name a few. This is not as efficient as it could be and requires manual effort to update and create dashboards etc. A ‘back to basics’ review of the spreadsheets currently in place will be undertaken to determine how to improve this activity.

In addition, now that Power BI is available in the Council, investigation of how this could help and/or enhance the data information that we need to report on.

Whilst there has been successful implementation of the Cenefits system (recording of delivered community benefits), there is scope to consider technology to support the front-end (community and supplier view) and this shall be progressed through the Community Wealth Building Support Group (as referenced in Section 15.2.1).

16.8 Customer Experience

As a result of feedback received from customer areas, it is clear that the complex procurement process can be daunting for those who have had little or no experience. A need has been identified to consider supports, such as e-learning, training etc. for different roles within the process.

List of Appendices

Appendix 1A - Summary of Regulated Procurement Activity

Appendix 1B - Community Benefits

Appendix 1C - Future Regulated Procurements (Pipeline)

Annex A - Scottish Government Statutory Return

Report Contact:

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Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
11401	Kelty Day Care Service (Extension)	Direct Award	Fife Council	£489,896	Capability Scotland	Large	Part-Local
10437	Foster and Continuing Care (Extension)	FC Framework	Fife Council	£1,110,000	Aberlour Childcare	Large	Part-Local
11584	Council Tax and Benefits (Orbis) (Extension)	Direct Call-Off	CCS	£692,555	Northgate Public Services (UK) Ltd	Large	Outwith Fife
11461	Robotic Process Automation (Extension)	Direct Award	Fife Council	£450,000	Blue Prism	Small	Outwith Fife
12687	32 tonne tipper	Mini-Comp	Scot. Excel	£120,200	Lothian DAF	Large	Outwith Fife
LUSI0027	Postal Services (excluding 1st Class Mail & Packages)	Direct Call-Off	CCS	£96,397	Whistl UK Ltd	Large	Outwith Fife
11084	Stratheden Re-Design (Extension)	Mini-Comp	Fife Council	£1,000,692	Kingdom Support and Care CIC	Large	Local
EF0013	Replacement Vans for Building Services	Direct Call-Off	CCS	£972,796	Ford Motor Company	Large	Part-Local
LUSI 029	Informix Licences	Call-Off	Scottish Procurement	£65,852	Softcat Ltd	Large	Outwith Fife
LUSI0018	Biomass Supply, Operation and Maintenance	Open Procedure	Fife Council	£2,276,558	Alternative Heat	Medium	Part-Local
12216	Sheriff Officer and Debt Collection Service	Direct Call-Off	Scot. Excel	£262,995	Scott & Co	Medium	Outwith Fife
					George Walker & Co T/A Walker Love	Medium	Outwith Fife
					Alex M Adamson	Small	Outwith Fife
CM0006	Supply and Installation of Windows and Doors	Open Procedure	Fife Council	£30,000,000	CMS Window Systems	Medium	Part-Local
12261	Supply of Heating Kits (Extension)	Mini-Comp	Scot. Excel	£550,000	Wolesely UK Ltd	Large	Part-Local
EF0015	Skip Collection Vehicles	Mini-Comp	Scot. Excel	£4,761,860	Lothian DAF	Large	Outwith Fife
EF0017	Replacement Road Sweeper	Direct Call-Off	Scot. Excel	£83,916	Scarab	Medium	Outwith Fife
972	Repair & Maintenance of Swimming Pools (Extension)	Open Procedure	Fife Council	£750,000	CMM Pools	Small	Outwith Fife

Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
10261	Care at Home (Extension)	Open Procedure	Fife Council	£180,000	1st Homecare Ltd	Large	Local
					ACASA Care Ltd	Small	Local
					ACS Care at Home Ltd	Small	Part-Local
					ARK Housing	Large	Part-Local
					Avenue Care Services	Medium	Local
					Avicenna Care Ltd	Micro	Local
					Capability Scotland	Large	Part-Local
					CarePlus (Scotland) Ltd	Small	Local
					Constance Care	Large	Part-Local
					Community Integrated Care	Large	Part-Local
					Cornerstone Community Care	Large	Part-Local
					Crossroads Fife Central	Small	Local
					Prestige Nursing	Medium	Local
					Enable Scotland	Medium	Part-Local
					Gibson Training and Care	Small	Local
					Hillcrest Futures	Large	Part-Local
					Keylink Services	Small	Part-Local
					Key Housing	Large	Part-Local
					Kingdom Support & Care CIC	Large	Local
					Leonard Cheshire	Large	Part-Local
					Cera Care	Large	Part-Local
					Oran Homecare Ltd	Small	Local
					Quarriers	Large	Part-Local
Rainbow Services (UK)	Small	Part-Local					
Real Life Options	Large	Part-Local					
Scottish Autism	Medium	Part-Local					
Sense Scotland	Large	Part-Local					
Sevacare (UK) Ltd	Large	Part-Local					
The Richmond Fellowship	Large	Part-Local					

Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
12604	Supply of PPE and Sanitising/Cleaning Products during COVID-19 pandemic only (Extension of DPS)	Open Procedure	Fife Council	£3,000,000	Various	Various	Various
12604	Supply of PPE and Sanitising/Cleaning Equipment during COVID19 pandemic only (Mini Competition 2)	Mini-Comp	Fife Council	£565,286	Aspire Industrial	Micro	Outwith Fife
					TR Bonnyman	Small	Outwith Fife
					AST Global	Small	Local
					Fleet Factors	Medium	Outwith Fife
					CambCol	Medium	Outwith Fife
					Instock Disposables	Medium	Outwith Fife
					Connect T/A PPE4Care	Medium	Outwith Fife
					Corston Sinclair	Small	Outwith Fife
					Unico	Medium	Outwith Fife
					Baca Workwear & Safety	Medium	Outwith Fife
10237	Hire of equipment, plant & vehicles (Extension)	Open Procedure	Fife Council	£4,640,000	Speedy Asset Services	Large	Part-Local
					Nixon Hire	Large	Outwith Fife
					Double A Trading	Small	Local
					Robert Purvis Plant Hire	Small	Local
					Gap Group Ltd	Large	Part-Local
					Jarvie Plant Ltd	Medium	Part-Local
					Vale Engineering York	Small	Outwith Fife
					Sandy Allan	Small	Local
					Strathore Plant Hire	Medium	Local
					E&J Douglas	Small	Local
					Willsweep Limited	Small	Outwith Fife
					James Penman Plant	Small	Local
					Murdo Mackenzie	Small	Outwith Fife
					Robert Houston & Sons	Small	Local
					Tayforth Machinery	Small	Part-Local

Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
12604	Supply of PPE and Cleaning/Sanitising products during COVID-19 pandemic only (DPS) (Extension)	Open Procedure	Fife Council	£2,500,000	Various	Various	Various
12259	Replacement Bathroom & Shower Installations (Extension)	Restricted Procedure	Fife Council	£980,000	Mctear Contracts	Medium	Part-Local
12153	Waste Disposal and Data Management System	Open Procedure	Fife Council	£114,330	VWS Software Solutions	Medium	Outwith Fife
10681	Fife In-College Support Service (Extension)	Direct Award	Fife Council	£2,099,709	Fife College	Large	Local
					SRUC Elmwood	Large	Part-Local
LUSI 026	Verint Support	Direct Call-Off	KCS	£870,000	Boxxe Ltd	Large	Outwith Fife
1362	Supply of PPE & Workwear	Mini-Comp	Scot. Excel	£2,000,000	The Arco Group	Large	Outwith Fife
					Lion Safety	Small	Outwith Fife
					Bunzl Greenham	Medium	Outwith Fife
					Alexandra Workwear	Medium	Outwith Fife
					Stax	Medium	Outwith Fife
					Engineering Agencies	Medium	Local
					Scott Direct	Medium	Outwith Fife
LUSI 035	SAN Support	Direct Call-Off	CCS	£130,000	MTI Ltd	Large	Outwith Fife
11478	Kitchen Installation Tender (Extension)	FC Framework	Fife Council	£3,600,000	Bell Group	Large	Part-Local
					Everwarm	Large	Part-Local
CW0028	Civil & Structural Consultancy, Anstruther Care Home	Mini-Comp	Fife Council	£54,582	Clyde Design	Small	Outwith Fife
CW0034	Civil & Structural Consultancy Abbey View Community Centre	Mini-Comp	Fife Council	£35,531	Clyde Design	Small	Outwith Fife
CW0031	Purchase of Leased Huts	Direct Award	Fife Council	£723,705	Sibcas	Medium	Outwith Fife
10054	Supply of Retail Sporting Goods for Resale within Fife Sports and Leisure Trust (Extension)	Open Procedure	Fife Council	£290,000	SportMax	Small	Outwith Fife
11682	Analytic Tool for Reducing Rent Arrears (Extension)	Direct Call-Off	CCS	£343,022	Mobysoft	Large	Outwith Fife

Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
CFM0039	Offshore Wind Structures Resource	Direct Award	Fife Council	£67,500	Scottish Engineering	Small	Part-Local
LUSI 022	Bereavement Digitisation	Direct Call-Off	CCS	£131,250	Plotbox Ltd	Large	Outwith Fife
LUSI0008	Supply and Installation of Local Area Network	Competitive with Negotiation	Fife Council	£3,004,489	Charterhouse Voice & Data Ltd	Medium	Outwith Fife
LUSI 037	Clearswift Licences	Direct Call-Off	Scottish Procurement	£150,000	Softbox Ltd	Large	Outwith Fife
11537	Electrical Testing and Rewire (Extension)	Restricted Procedure	Fife Council	£16,000,000	Moffat Electrical Projects	Medium	Local
11352	Heating Installation Services to Domestic Properties inc MCS	FC Framework	Fife Council	£16,500,000	Mctear Contracts	Medium	Part-Local
					British Gas	Large	Outwith Fife
10626	House Clearance And Cleaning & Associated Services	Open Procedure	Fife Council	£5,600,000	Orbis Protect Ltd	Large	Outwith Fife
					VPS (UK) Ltd	Large	Outwith Fife
					Flexi Clean Group	Medium	Outwith Fife
LUSI 030	Commvault Licences and Support	Direct Call-Off	Scottish Procurement	£150,000	Softcat Ltd	Large	Outwith Fife
CM0014	Supply of Plumbing and Heating Kits for Methil Care Village	Mini-Comp	Scot. Excel	£113,871	William Wilson Ltd	Medium	Local
CFM002	Provision of Legal Servicing, Support, Advice & Representation: General Legal Services & Court of Session Work	Open Procedure	Fife Council	£920,000	Harper MacLeod	Large	Outwith Fife
CW0006	Seating for Adam Smith Theatre	Open Procedure	Fife Council	£159,108	Audience Systems Ltd	Small	Outwith Fife
CFM0018	Cleaning of Bins, Bin Chutes and Associated Storage Areas	Open Procedure	Fife Council	£237,068	Orbis Initial UK	Large	Part-Local
EF0019	16 tonne RCV	Direct Call-Off	Scot. Excel	£147,919	Farid Hillend	Medium	Local
CFM0046	Business Engagement Executive for DYW Fife	Direct Award	Fife Council	£114,888	Fife Chamber of Commerce	Micro	Local

Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
12114	Provision of Printwork (Extension)	Mini-Comp	Scottish Procurement	£200,000	Pandaprint Colour & Digital Printers	Small	Local
					Barr Printers Ltd	Small	Local
					J Thomson Colour	Small	Outwith Fife
EF0014	Bird Of Prey Provision	Open Procedure	Fife Council	£167,000	NBC Environmental Ltd	Medium	Part-Local
LUSI 034	Application Monitoring Tool	Direct Call-Off	CCS	£53,000	Dynatrace	Large	Outwith Fife
CFM0023	Provision of Merchant Services	Direct Call-Off	CCS	£234,000	Worldpay UK Ltd	Large	Outwith Fife
12424	Independent Professional Observer	Open Procedure	Fife Council	£108,000	Giffordgate - Clare	Micro	Outwith Fife
CFM0033	Provision of Voting and Engagement Services for Pension Fund	Direct Call-Off	City of Edinburgh Council	£63,000	Hermes Equity	Large	Outwith Fife
P995855	Monitoring Services for Water Quality Testing (including Legionella)	Direct Call-Off	Fife Council	£416,250	IWS	Large	Part-Local
P995987	Maintenance and Repairs to Central Battery Installations	Open Procedure	Fife Council	£375,000	JD & Hamilton	Micro	Local
10001	Actuarial Service (Extension)	Open Procedure	Fife Council	£300,000	Hymans Robertson	Large	Outwith Fife
AT9882	Framework for C14 Lighting Installation Works up to	Open Procedure	Fife Council	£1,000,000	Lightways	Medium	Outwith Fife
					T&N Gilmartin	Medium	Local
11952	Supply and Delivery of Groceries	Direct Call-Off	Scot. Excel	£4,500,000	William Yule & Son	Small	Local
					Adamson Drinks	Small	Local
11300	Oracle Support (Extension)	Call-Off	CCS	£1,600,000	Evosys	Large	Outwith Fife
LUSI 011	Supply of Yotta System	Call-Off	CCS	£200,000	Yotta Ltd	Medium	Outwith Fife
CM0011	CO2 Monitors	Call-Off	Scot. Excel	£37,800	Holland House Electrical	Medium	Part-Local
11952	Supply and Delivery of Groceries	Direct Call-Off	Scot. Excel	£4,500,000	William Yule & Son	Small	Local
					Adamson Drinks	Small	Local
AT9882	Framework for C14 Lighting Installation Works up to	Open Procedure	Fife Council	£1,000,000	Lightways	Medium	Outwith Fife
					T&N Gilmartin	Medium	Local

Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
12604	Supply of PPE & Sanitising products during Covid-19 pandemic only (Mini Competition 03)	Mini-Comp	Fife Council	£274,115	Streamline Corporate	Small	Outwith Fife
					Lyreco	Large	Outwith Fife
					Corston Sinclair	Small	Outwith Fife
					Aspire Industrial	Small	Outwith Fife
					DTS Trading	Small	Outwith Fife
					Instock Disposables	Medium	Outwith Fife
					Unico	Medium	Outwith Fife
					Scientific Laboratories	Medium	Outwith Fife
					Creative Activity	Small	Outwith Fife
					Lion Safety	Small	Outwith Fife
					Baca Workwear & Safety	Medium	Outwith Fife
1200	Supply & Delivery of Road Construction Material (Extension)	Open Procedure	Fife Council	£12,000,000	SMI	Medium	Outwith Fife
					Breedon	Large	Part-local
					Cemex	Large	Part-local
					Tarmac	Large	Part-local
					Collier Quarrying and Recycling	Small	Local
					Tillicoultry Quarries	Medium	Part-local
					Angle Park	Small	Local
10340	North Fife Local Buses (Extension)	Modification	Fife Council	£7,659,940	Skene Group	Medium	Part-local
					A1 Minibus & Coach Services	Small	Local
					Moffat & Williamson Ltd	Medium	Local
					Xplore Dundee	Large	Outwith Fife
10346	North Fife School Buses (Extension)	Modification	Fife Council	£19,800,000	Stagecoach	Large	Local
					Moffat & Williamson Ltd	Medium	Local
					Xplore Dundee	Large	Outwith Fife
					A1 Minibus & Coach Services	Small	Local
					Festival Travel (Scotland) Ltd	Micro	Outwith Fife

Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
11195	South Fife Local Buses (Extension)	Modification	Fife Council	£3,720,804	Stagecoach	Large	Local
					First Scotland East Limited	Large	Outwith Fife
					Bay Travel Coaches Ltd	Medium	Local
					Moffat & Williamson Ltd	Medium	Local
					A1 Minibus & Coach Services	Small	Local
10349	South Fife School Buses (Extension)	Modification	Fife Council	£34,598,914	Bay Travel Coaches Ltd	Medium	Local
					Festival Travel (Scotland) Ltd	Micro	Outwith Fife
					First Scotland East Limited	Large	Outwith Fife
					Merlin Travel	Small	Local
					Prentice Westwood	Small	Outwith Fife
	Stagecoach	Large	Local				
EF0024	Vehicle Activated Signs for Standing Stane Road	Open Procedure	Fife Council	£94,714	Clearview Intelligence	Medium	Outwith Fife
LUSI 046	Total Mobile	Direct Call-Off	CCS	£1,031,000	Total Mobile	Large	Outwith Fife
12331	Education Taxis DPS - Summer 21 Mini-Competitions	Mini-Comp	Fife Council	£4,052,893	Various (101 suppliers)	All SMEs	Local
10365	Lifts and Hoists Framework Agreement	Open Procedure	Fife Council	£1,400,000	Advanced Stairlists	Micro	Local
					W Munro (Rehab) Ltd	Small	Outwith Fife
CFM0056	Purchase Installation & Maintenance for Balwearie Fitness Equipment	Direct Call-Off	ESPO	£100,000	Origin Fitness	Medium	Outwith Fife
LUSI0051	Mobile Services	Direct Call-Off	CCS	£1,915,164	Telefonica UK Limited	Large	Outwith Fife
10315	Minor Works Framework (Extension)	Open Procedure	Fife Council	£1,200,000	Kingdom Maintenance	Small	Local
EF0031	Winter Maintenance Provision	Quick Quote	Fife Council	£49,570	Inex Works Group Ltd	Small	Part-Local
EF0034	Purchase of 9 Nissan Leafs (ex lease)	Direct Award	Fife Council	£153,250	Days Fleet	Small	Outwith Fife

Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
LUSI0040	Compliance Document Management System (CDMS)	Direct Award	Fife Council	£164,835	Corgi Technical	Large	Outwith Fife
CFM0061	Insurance for Fife Council unoccupied properties and FRS landfill sites	Direct Award	Fife Council	£2,500,000	The White Rock	Medium	Outwith Fife
12541	Staging for Rothes Halls	Direct Award	Fife Council	£162,372	SICO	Medium	Outwith Fife
P081375	Maintenance and Repairs of Passenger Lifts Framework	Open Procedure	Fife Council	£700,000	Consult Lifts	Small	Outwith Fife
					TK Elevator UK Ltd	Large	Outwith Fife
					Caltech Lifts	Small	Outwith Fife
CW0036	Civil & Structural Engineering Consultancy, Fife Interchange North	Open Procedure	Fife Council	£46,985	Kiloh Associates	Small	Outwith Fife
CW0052	Affordable Housing (Cardenden Requirement)	Direct Award	Fife Council	£63,848	RB Grant Ltd	Small	Local
					Sanday Allan Blacksmith	Small	Local
					Insulated Render	Small	Outwith Fife
					Discovery Fire	Small	Outwith Fife
					Stuart King Architecture & Design	Small	Local
EF0027	Replacement Vehicles for Grounds Maintenance	Direct Call-Off	CCS	£343,750	Ford Motor Company	Large	Part-Local
CFM0045	Meal Concepts	Direct Call-Off	ESPO	£210,000	Pasta King	Medium	Outwith Fife
CFM0044	Sandwiches and Food To Go	Direct Call-Off	ESPO	£300,000	PJ Foods	Medium	Outwith Fife
11030	Hire of plant and development works at Lochhead Landfill Site (Extension)	Open Procedure	Fife Council	£20,879,000	Landfill Services	Small	Local
P995839	Maintenance, Repairs & Emergency Call Outs for Automatic Doors & Roller Shutters	Direct Award	Fife Council	£170,000	Alpha Doors & Shutters	Small	Outwith Fife
CFM0040/078	Refurbishment and Hygienic Cleaning of Medical Aids	Direct Award	Fife Council	£495,564	Matrix Fife	Large	Local

Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
EF0040	Supply of Summer Bedding Plants	Open Procedure	Fife Council	£38,111	Craigmarloch Nurseries	Small	Outwith Fife
CFM0036	Provision of a Funeral and Undertaking Service	Open Procedure	Fife Council	£252,000	Stewart Funeral	Micro	Outwith Fife
1445	Timber Preservation Framework (Extension)	Open Procedure	Fife Council	£4,000,000	The Preservation Company	Small	Local
					Richardson & Starling	Medium	Local
12376	Supply & Installation of External Ramps	Open Procedure	Fife Council	£1,950,000	Garvock Services Ltd	Micro	Local
LUSI0058	Mind of My Own App	Direct Award	Fife Council	£61,174	Mind of My Own	Small	Outwith Fife
11027	Supply and Installation of Window Blinds (Extension)	Open Procedure	Fife Council	£420,230	Val-U Blinds	Small	Local
					Bell Group	Large	Part-local
					Stewarts Blinds	Micro	Outwith Fife
CFM0013	Supply of Education Materials	Mini-Comp	Scot. Excel	£5,560,000	Findel Education Ltd	Large	Outwith Fife
					TTS Group	Large	Outwith Fife
					YPO	Large	Outwith Fife
					ESPO	Large	Outwith Fife
					WF Enterprises	Medium	Outwith Fife
					Bishop Sport	Medium	Outwith Fife
					Foams	Medium	Outwith Fife
					Anderson Scientific	Medium	Outwith Fife
					Clyde Paper	Medium	Outwith Fife
					GHP	Medium	Outwith Fife
					Hamelin	Medium	Outwith Fife
					Invinos	Medium	Outwith Fife
					KCS	Medium	Outwith Fife
					Muddy Faces	Medium	Outwith Fife
					Newitts	Medium	Outwith Fife
					Sci Chem	Medium	Outwith Fife
					Seawhite	Medium	Outwith Fife
					RM Consortium	Large	Outwith Fife
					Cosy Direct	Medium	Outwith Fife

Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
P995899	Servicing and Repair to Commercial Refrigeration Equipment	Call-Off	Scot. Excel	£70,000	Lovat's Catering	Small	Local
P995950	Servicing and Repairs to Commercial Catering Equipment	Call-Off	Scot. Excel	£180,000	Lovat's Catering	Small	Local
LUSI0006	Supply of Gas	Direct Call-Off	Scottish Procurement	£8,800,000	Total Gas and Power	Large	Outwith Fife
LUSI 067	Road AI	Direct Call-Off	Scottish Procurement	£86,000	Softcat Ltd	Large	Outwith Fife
EF0035	Purchase of Leased Vehicle	Direct Award	Fife Council	£225,216	Link Asset Services	Large	Outwith Fife
11509	Maintenance of traffic signals (Extension)	Mini-Comp	CCS	£708,950	Dynniq UK Ltd	Large	Part-Local
EF0041	Purchase of 6 grass mowing machines	Mini-Comp	Scot. Excel	£203,940	Gammie Groundcare	Small	Outwith Fife
12156	Supply & Delivery of First Aid Products (Extension)	Direct Call-Off	Scot. Excel	£118,056	Wallace Cameron	Medium	Outwith Fife
LUSI0068	Demand Responsive Transport Solution Upgrade	Competitive with Negotiation	Fife Council	£16,000	Trapeze Group (UK) Ltd	Medium	Outwith Fife
10731	Children's Residential Care and Education Services (Extension)	Extension	Fife Council	£44,000,000	Starley Hall School	Medium	Local
11733	HRA Business Plan (Extension)	Direct Award	Fife Council	£40,000	Arneill Johnston	Small	Outwith Fife
10722	Provision of Consultancy for the Fife Macmillan Improving the Cancer Journey (Extension)	Direct Award	Fife Council	£85,988	National Services Scotland, Information Services Division	Large	Outwith Fife
CFM0006	Provision of Employee Physiotherapy	Open Procedure	Fife Council	£240,000	Connect Health	Small	Part-Local
	Provision of Employee Counselling	Open Procedure	Fife Council	£240,000	TCS Group	Medium	Part-Local
CM0005	Supply of Kitchens	Direct Call-Off	Scot. Excel	£790,000	JTC Group	Large	Outwith Fife

Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
CFM0007	Provision of Occupational Health	Call-Off	ESPO	£279,516	People Asset	Medium	Part-Local
12500	Vehicle Conversions	Mini-Comp	CCS	£1,000,000	Bott Ltd	Large	Outwith Fife
SC0022	Fostering & Continuing Care	Call-Off	Scot. Excel	£20,000,000	Aberlour Child Care Trust	Large	Part-Local
					Action for Children	Large	Part-Local
					Barnardo's	Large	Part-Local
					Carevisions Fostering Ltd	Small	Part-Local
					Carolina House Trust	Small	Part-Local
					Foster Care Associates Scotland Ltd	Small	Part-Local
					Dean & Cauvin Young People's Trust	Small	Part-Local
					Foster Care Connect Ltd	Micro	Part-Local
					Fostering People Scotland Ltd	Micro	Part-Local
					Fostering Relations Ltd	Micro	Part-Local
					Fosterplus (Fostercare) Ltd	Small	Part-Local
					St. Andrews Children's Society Ltd	Small	Part-Local
					SWIIS Foster Care Scotland Ltd	Medium	Part-Local
					The Adolescent and Children's Trust (TACT)	Medium	Part-Local
					The National Fostering Agency (Scotland) Ltd	Medium	Part-Local
CFM0035	Trust Accounts and Advice	Direct Call-Off	Fife Council	£90,000	Henderson Logie LLP	Medium	Outwith Fife
CW0070	Play Park Annual Inspections	Mini-Comp	Scot. Excel	£62,910	Play Service Ireland	Small	Outwith Fife

Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
P995850	Servicing, Repairs & Monitoring of Intruder Alarms and Door Entry Systems	Variation	Fife Council	£1,284,000	Security & Fire Systems	Small	Local
10606	Youth Justice Service for Children and Young People (Extension)	Open Procedure	Fife Council	£975,524	SACRO	Large	Part-Local
LUSI066	Autodesk Licences	Mini-Comp	KCS	£380,276	Pheonix Software Ltd	Large	Outwith Fife
CFM0049	Supply & Distribution of Milk	Direct Call-Off	Scot. Excel	£2,800,000	Muller	Large	Outwith Fife
12604	Supply of PPE, Cleaning and Sanitising Equipment during COVID-19 Benchmarking	Mini-Comp	Fife Council	£100,000	Instock Disposables	Medium	Outwith Fife
1348	Lyreco Supply of General Office Stationary (Extension)	Call-Off	Scottish Procurement	£1,200,000	Lyreco	Large	Part-Local
CM0015	Tourism Signage - Forth Bridges Area	Open Procedure	Fife Council	£295,000	Paul Hogarth Company Limited	Small	Outwith Fife
EF0044	Purchase of machinery for Fife Golf Trust	Mini-Comp	Scot. Excel	£55,300	The Double A Trading	Small	Local
				£17,806	Fairways	Medium	Outwith Fife
CFM0052	Care Home Furniture and Furnishings	Direct Award	Fife Council	£120,388	Matrix Fife	Large	Local
11322	Liabilities & Miscellaneous Insurance (Extension)	Open Procedure	Fife Council	£4,558,950	Risk Management	Medium	Outwith Fife
				£83,111	Zurich Municipal	Large	Outwith Fife
10321	Insurance - Property	Open Procedure	Fife Council	£4,167,078	Zurich Municipal	Large	Outwith Fife
	Insurance - Motor, Airside, PA			£2,283,705	Risk Management	Medium	Outwith Fife
	Insurance - Fine Art			£60,072	Axa Art	Medium	Outwith Fife
CFM0061	Insurance for unoccupied buildings and FRS waste sites (Extension)	Open Procedure	Fife Council	£2,500,000	The White Rock	Medium	Outwith Fife
10205	Rating and Valuations (Extension)	Open Procedure	Fife Council	£150,000	GVA	Large	Outwith Fife
CFM0071	Alcoholic Beverages	Call-Off	Scot. Excel	£225,000	Tennents	Large	Outwith Fife
LUSI0061	Provision of an Office 365 Back Up System	Call-Off	KCS	£44,202	Pheonix Software	Large	Outwith Fife

Contract Ref./No.	Contract Title	Procedure	Initiating Contract Owner	Contract Value (inc. extensions) (note 1)	Supplier Name(s)	Supplier Size (note 2)	Locality of Supplier (note 3)
11953	Provision of Fresh Fruit and Vegetables (Extension)	Call-Off	Scot. Excel	£2,800,000	Carruthers	Large	Outwith Fife
10724	Supply & Delivery of Fresh Meats, Cooked Meats and Fresh Fish (Extension)	Direct Call-Off	Scot. Excel	£2,000,000	Campbell Brothers	Medium	Outwith Fife
CFM0080	University of Hull Consultancy	Direct Award	Fife Council	£50,000	Lampada Digital	Large	Outwith Fife
LUSI0052	COMIS Replacement System (TotalMobile award only)	Direct Call-Off	CCS	£689,340	Total Mobile	Large	Outwith Fife
10607	Supply & Delivery of Frozen Foods (Extension)	Direct Call-Off	Scot. Excel	£7,200,000	William Yule & Son	Small	Local
CM0019	Amenity Units - Tarvit Mill	Open Procedure	Fife Council	£1,949,760	Healthmatic	Medium	Outwith Fife
LUSI0005	Supply of Electricity	Direct Call-Off	Scottish Procurement	£40,000,000	EDF Energy	Large	Outwith Fife
LUSI0007	Supply of Water	Direct Call-Off	Scottish Procurement	£12,800,000	Business Stream	Large	Outwith Fife

Note 1 - Value stated is approximate value over the potential lifetime of the contract. Unless one-off purchase, most contracts are multi-year, and typically 4 years but some contracts might be up to 7/8 years.

Note 2 - Size Definitions: Sole Trader (self-employed individual); Micro (<10 employees); Small (10-49 employees); Medium (50-249 employees); Large (>250 employees)

Note 3 - Locality Definitions: Local (Fife Supplier (HQ base in Fife)); Part Local (have depot/staff in fife but organisation not based in Fife); Outwith Fife (all business outwith Fife)

APR Reporting Category	Contract Description	Benefit Description	Committed Units (where provided)	Committed Value (where provided)
Jobs (Priority Groups)	Cleaning and sanitising of Bin Chutes, bins and associated storage areas	Employment up to 2 full time staff	2	
	Dunfermline Learning Campus - Enabling Works	SFT1 No. of local direct employees (FTE) hired or retained	6.82	£190,410
		SFT2 % of local people employed on contract (FTE)	54	
		SFT3 Local jobs advertised	5	
Appreticeships (Priority Groups)	Dunfermline Learning Campus - Enabling Works	SFT20 No. of weeks of apprenticeships on the contract	104.14	£21,599
	City Deals - Industrial Units	Employment of Apprentices	2	
	Building Services (Internal)	Delivery of Apprenticeships by Building Services	30	
	Electrical Testing - Public Buildings (PA Testing)	Electrical operational team have opportunities for 2 young people from Waid Academy to a week of work experience.	2	
	Templehall Nursery Refurbishment	Apprenticeships		£30,000
Work Placements (Priority Groups)	Supply 6 Grass Moving Machines	Work experience	1	
	Dunfermline Learning Campus - Enabling Works	SFT11 No. of hours dedicated to support young people into work	528	£66,327
Qualifications (Priority Groups)	City Deals - Industrial Units	SVQ Level 3 - Production of Glass and Fabrication	1	
Other - Skills and Training	Social Care Agency Workers	Delivery of free training for 150 people	150	
Other - Social Value Rebate	Electrical Testing - Public Buildings (PA Testing)	Christmas (2021) appeal - Donation to Glenrothes Foodbank		£250
	Uplift and Disposal of IT Equipment	Donation to charity		£250
	Specialised Paper	Donation of Exercise Books (£350) to School and Sanitisation Products (£150) to Fife based charity		£500
	Children's Residential Care and Education	Cheque to Fife Charities Trust/Education to support STEM/Community-based Education project/Fife Charity(s)		£1,500
	Uplift and Disposal of IT Equipment	Donation to Charity		£100

APR Reporting Category	Contract Description	Benefit Description	Committed Units (where provided)	Committed Value (where provided)	
Other - Social Value Rebate	Amazon Smile Orders	Donations to Fife Gingerbread against individual orders		£291	
	Uplift and Disposal of IT Equipment	Donation to Charity (Homestart Kirkcaldy)		£222	
	Uplift and Disposal of IT Equipment	Donation to a Local Charity (Home Start Glenrothes)		£250	
	Uplift and Disposal of IT Equipment	Charity Cheque Donation		£230	
	Uplift and Disposal of IT Equipment	Charitable Donation to The Friendship Cabin		£200	
	Uplift and Disposal of IT Equipment	Donation to Local Charity (Crossroads Fife)		£250	
	Uplift and Disposal of IT Equipment	Donation to Charity		£220	
	Electrical Testing - Public Buildings (PA Testing)	Electrical Works carried out for Charity/Community minus materials costs (Materials provided FOC)	Donation of Selection Boxes to Fife Foodbank		
	Electrical Testing - Public Buildings (PA Testing)	The organisation sponsored the Glenrothes Strollers to assist them with their new kit and a cheque was sent to the Football team			
	Supply & Delivery of Education Materials	On the 1st of October 2021 Rosslyn school received worth of SEN and Sensory equipment for their garden		£300	
	Uplift and Disposal of IT Equipment	Donation to Local Charity (Love Oliver)		£75	
	North Fife Local Bus Framework	Fares Freeze	1		
	Building Services Frameworks	Cottage Family Christmas Appeal - Hampers and distribution			
		Cottage Family Centre - Painting of mural on nursery wall	1		
		Cottage Family Centre - Community Food Parcels			
	Hire of Equipment Plant and Vehicles	Loan of scaffolding tower to Andy's Man Club		£3,000	
Specialised Paper	Exercise books and learning materials to an education facility and sanitisation products to a Fife based charity		£500		
Supply of Electrical Materials (through SXL Framework)	Donation to local charity (Dunniker Golf Club Juniors)		£200		
Servicing & Repair of Warden Call Equipment	BACS transfer to Glenrothes Foodbank		£500		

APR Reporting Category	Contract Description	Benefit Description	Committed Units (where provided)	Committed Value (where provided)
Other - SME and Third Sector		SFT27 Meet the buyer' events held to highlight local supply chain opportunities		£3,844
	Dunfermline Learning Campus - Enabling Works	SFT1a No. of local people (FTE) on contract (supply chain only)	1.57	£43,780
	Building Services - Realm Construction	Local Supplier Spend i.e. Plant & Materials		£175,658

Note - this is indicative only and subject to continuous update. Some contracts have optional extensions which may be utilised. Refreshed pipeline is published on <https://www.fife.gov.uk/kb/docs/articles/business2/doing-business-with-us> on a regular basis.

Description	Anticipated Type of Procurement	Anticipated Start of Procurement Activity or Contract Start Date	Anticipated Total Value (where known)
Corporate/FM Category			
Milk Bar Fridge Hire and Accessories	Fife Council Contract	01/02/2023	£ 66,000
Provision of Frozen Foods	Scotland Excel Framework	01/10/2024	£ 7,200,000
Pre-Packed Cakes and Biscuit Products at Coffee Kiosks	Fife Council Contract	01/04/2023	£ 700,000
Fresh Meats, Cooked Meats and Fresh Fish	Scotland Excel Framework	01/07/2023	£ 2,000,000
Fresh Fish to Group Homes and Commercial Premises	Fife Council Contract	23/05/2026	£ 170,000
Fresh Fruit and Vegetables	Scotland Excel Framework	01/04/2023	£ 1,500,000
Community Meals	Scotland Excel Framework	01/09/2023	£ 1,300,000
Vending Services FSLT	TBC	01/09/2023	
Coffee and Coffee Related Products	Scotland Excel Framework	01/08/2024	£ 880,000
Catering Sundries/Disposables	Scotland Excel Framework	01/08/2024	£ 880,000
Groceries & Provisions	Scotland Excel Framework	01/05/2024	£ 8,000,000
Alcohol and Beverages	Scotland Excel Framework	01/08/2023	£ 400,000
Sandwiches and Food to Go	ESPO Framework	01/12/2024	£ 415,000
Meal Concepts	ESPO Framework	02/12/2024	£ 280,000
Transcription/Translation/Interpretation	Fife Council Contract	01/08/2023	£ 640,000
Housing Customer Satisfaction Survey	Fife Council Contract	01/10/2023	£ 50,000
Provision of Print Services	Scottish Procurement Framework	01/02/2023	£ 150,000
Exhibition Services	Fife Council Contract	01/01/2023	£ 160,000
Marketing Services	Scottish Procurement Framework	01/12/2022	
Advertising and Public Notices	Scottish Procurement Framework	11/07/2024	£ 120,000
Media Services	Scottish Procurement Framework	01/12/2022	£ 136,576
School Travel Passes & Accompanying Documentation	Fife Council Contract	07/06/2023	£ 34,000
Cleaning Equipment	Scotland Excel Framework	01/05/2023	
Provision of Window Cleaning Services	Fife Council Contract	01/02/2023	£ 60,000
Janitorial Products	Scotland Excel Framework	01/09/2023	£ 1,000,000
Vehicle Steam Cleaning	Fife Council Contract	01/02/2023	£ 500,000
Cleaning of Bins, Bin Chutes and Bin Storage Areas	Fife Council Contract	30/07/2023	£ 320,000
Heavy Duty Laundry Equipment inc. R&M	Fife Council Contract	01/02/2023	£ 540,000

Description	Anticipated Type of Procurement	Anticipated Start of Procurement Activity or Contract Start Date	Anticipated Total Value (where known)
Cash in Transit (including Car Park Collections)	Scotland Excel Framework	01/07/2025	£ 215,921
Pre Loaded Financial Cards	Crown Commercial Services Framework	01/06/2023	£ 8,500,000
Payment Services	Procurement for Housing Framework	01/12/2022	£ 500,000
Accounting for Trusts	Fife Council Contract	01/01/2023	£ 100,000
Merchant Services	Crown Commercial Services Framework	01/05/2023	£ 120,000
Global Custodian/Performance	Fife Council Contract	01/11/2023	£ 800,000
Rating and Valuations		01/04/2023	£ 250,000
Single Person Discounts	Fife Council Contract	01/11/2022	£ 50,000
Purchasing Cards	Crown Commercial Services Framework	01/02/2023	£ 8,500,000
Banking Service	Crown Commercial Services Framework	01/04/2024	£ 300,000
Sheriff Officer/Debt Collection	Scotland Excel Framework	01/04/2024	£ 180,000
Fife Council Insurance Contracts	Fife Council Contract(s)	01/04/2023	£ 16,000,000
General Office Stationery and Equipment	Scottish Procurement Framework	01/04/2023	£ 1,200,000
Specialised Paper and Wide Format Media	Fife Council Contract	01/03/2025	£ 400,000
CEC Management qualification (ILM)	Fife Council DPS	01/11/2022	£ 80,000
Employee Benefits Package		02/04/2023	£ 7,700
Provision of Social Workers	Scotland Excel Framework	31/03/2023	£ 1,200,000
Temporary & Interim Staff Services	Scottish Procurement Framework	13/04/2023	£ 1,100,000
Business Support for Kirkcaldy Business Incubator and Dunfermline Business Centre	Fife Council Contract	23/11/2023	£ 127,500
Business Support for Fife Renewables Innovation Centre	Fife Council Contract	23/11/2023	£111.600.00
Sexual Abuse Supporting Children & Young People: Foster Carers Sexual Abuse Training.	Fife Council DPS	01/04/2024	£ 8,700
Assessing Children who present with Sexual Abuse Supporting Children & Young People: Management & Risk reduction approach (MARRS).	Fife Council DPS	01/04/2024	£ 12,240
Performance & Care Excellence	Fife Council DPS	01/04/2024	£ 15,120
Professional Development Award (PDA) in Housing Law Advice	Fife Council DPS	04/05/2024	£ 93,000
Business Engagement Executive for DYW Fife	Fife Council Contract	01/08/2023	£ 114,888
Hygienic Cleaning of Medical Aids	Fife Council Contract	04/01/2024	£ 495,565

Description	Anticipated Type of Procurement	Anticipated Start of Procurement Activity or Contract Start Date	Anticipated Total Value (where known)
Supply & Installation of Bed Pan Washers with Inclusive Maintenance	Fife Council Contract	01/02/2023	£ 26,000
Medical Aids for Health Professionals to Fife Council Community Equipment Stores	Fife Council Contract	02/11/2022	£ 6,600,000
Maintenance & Servicing of Electric Profiling Beds	Fife Council Contract	02/07/2023	£ 83,692
First Aid Products	Scotland Excel Framework	01/04/2023	£ 176,000
Medical Assessment for Taxi Drivers and Pension Appeals	Fife Council Contract	01/05/2024	£ 48,000
Early Learning & Childcare Funded Partnerships 3 year	Fife Council Contract	15/08/2023	£ 2,200,000
Provision of Educational Materials	Scotland Excel Framework	02/02/2023	£ 5,560,000
Building and Timber Materials (Education)	Scotland Excel Framework	01/07/2023	£ 180,000
Maintenance & Servicing of Laser Equipment	Fife Council Contract	31/10/2024	£ 25,000
Water Quality Testing	Fife Council Contract	01/09/2023	£ 64,000
Swimming Pool Chemicals		15/02/2023	£ 312,000
Business Travel Services	Fife Council Contract	01/04/2023	£ 10,000
Fitness Equipment	ESPO Framework	01/02/2024	£ 1,100,000
Document Scanning & Storage	Fife Council Contract	01/01/2023	
Promotional Items	Fife Council Contract	01/04/2023	£ 40,000
Security Shredding Service	Fife Council Contract	01/12/2022	£ 50,000
Resale of Sporting Goods for Fife Sports Leisure Facilities	Fife Council Contract	01/04/2023	£ 290,000
Provision of a Removals and Storage Service	Fife Council Contract	01/08/2025	£ 450,000
Provision of General Legal Services & Court of Session Work	Fife Council Contract	01/07/2024	£ 920,000
The Community Trade Hub Project	Fife Council Contract	01/12/2022	£ 33,000
Electoral Canvassing	Fife Council Contract	01/03/2023	
Provision of Domestic Whitegoods for Commercial Premises	TBC	01/04/2023	£ 200,000
Supply, Installation, Repair & Alteration of Window Blinds	Fife Council Contract	01/02/2024	£ 420,230
Rollerboards	Fife Council Contract	01/09/2023	£ 150,000
Chair Services for Child Protection Committee	Fife Council Contract	01/12/2022	£ 60,000
HRA & GFHA Business Plans	Fife Council Contract	01/11/2022	£ 115,000
Child Protection Committee Case Reviews	Fife Council Contract	14/12/2023	£ 20,000
Independent Professional Observer	Fife Council Contract	01/09/2023	£ 72,000
Annual Inspection of Play Parks & Gym Equipment	Crown Commercial Services Framework	01/12/2022	£ 45,000

Description	Anticipated Type of Procurement	Anticipated Start of Procurement Activity or Contract Start Date	Anticipated Total Value (where known)
Memorial Plaques and Path Kerbers	Fife Council Contract	01/06/2023	£ 88,000
Provision of a Funeral and Undertaking Service	Fife Council Contract	01/02/2025	£ 131,848
Children's Clothing	Fife Council Contract	01/07/2023	
Provision of PPE and Workwear	Scotland Excel Framework	01/07/2023	£ 1,500,000
Provision of Winter Warmer Packs	Fife Council Contract	01/11/2022	£ 30,500
Environment, Waste, Fleet & Plant			
Provision of Tipping Service	Fife Council Contract	01/01/2023	£ 130,000
Transportation of Leachate	Fife Council Contract	01/01/2023	
Trees, Plants and Shrubs	Fife Council Contract	01/01/2023	
Horticultural Materials	Fife Council Contract	01/01/2023	£ 267,004
Glass Waste Recycling Provision	SXL Framework/DPS	01/01/2023	
Hire of Plant and Development Works at Lochhead Landfill Site	Fife Council Contract	01/06/2023	
Textile Recycling Provision	SXL Framework/DPS	01/12/2022	
Public Analyst Service for FRS	Fife Council Contract	01/11/2022	
Fuel Cards	Crown Commercial Services Framework	01/01/2023	£ 360,000
Vehicle Recovery Service	Fife Council Contract	01/04/2023	£ 185,000
Coachwork Repair Services	Fife Council Contract	01/10/2022	£ 840,000
Maintenance of Traffic Signals, Light Controlled Pedestrian Crossings, Vehicle Actuated and Variable Message Signs	Crown Commercial Services Framework	01/05/2024	£ 525,000
Vehicle Auctions	Extension/Fife Council Framework	01/04/2024	INCOME
Hire and Relocation of Welfare and Secure Cabins	Fife Council Contract	01/03/2024	£ 483,368
Liquid Fuels	Crown Commercial Services/Scottish Government Framework	01/04/2023	£ 6,000,000
Logistics, Mail & Utilities			
Postal Services	Framework Direct Call off	15/05/2023	
Non-Half Hourly Electricity and Gas Meter Services	Fife Council Contract	01/05/2023	
Electricity	Framework Direct Call off	31/03/2024	
Water	Framework Direct Call off	31/03/2024	
Energy Efficiency Programme Management	Framework Mini Comp	28/02/2024	
Gas	Framework Direct Call off	31/03/2025	
Biomass Supply and Maintenance	Fife Council Contract	09/05/2025	
Postal Services	Framework Direct Call off	15/05/2023	
Hybrid Mail	Framework Direct Call off	01/04/2023	

Description	Anticipated Type of Procurement	Anticipated Start of Procurement Activity or Contract Start Date	Anticipated Total Value (where known)
Social Care			
Care & Support at Home for Adults & Older People	Fife Council Contract	01/05/2023	£ 48,000,000
CAH - Adult Supported Living	Fife Council Contract	01/05/2023	£ 136,000,000
Children's Residential Care & Education Services	Scotland Excel Framework	01/10/2022	£ 9,000,000
Advocacy	Fife Council Contract	01/04/2023	£ 1,377,487
Youth Justice Service	Fife Council Contract	01/04/2023	£ 975,000
Care Homes for Adults with LD	Scotland Excel Framework	16/09/2023	
Care Homes for Adults	Fife Council Contract		
Group Living	Fife Council Contract		£ 13,500,000
Fostering and Continuing Care	Scotland Excel Framework	01/07/2025	£ 34,000,000
Secure Care	Scotland Excel Framework	01/04/2025	£ 4,000,000
National Care Home Contract	Fife Council Contract	06/05/2023	£ 50,600,000
Free Personal Care	Fife Council Contract	01/04/2023	£ 6,750,000
Free Personal Care External to Fife	Fife Council Contract	01/04/2023	£ 1,120,000
Stratheden Re-design, Mini Comp under 10261	Fife Council Contract	01/06/2023	£ 1,500,000
Kelty Day Care Service	Fife Council Contract	24/04/2023	£ 1,000,000
Care and Support Services for 5 Service Users (Lynebank)	Fife Council Contract	03/11/2024	£ 6,200,000
Fife in-College Support Service	Fife Council Contract	01/08/2027	£ 3,600,000
Travel & Transportation			
DPS: Adhoc Bus & Coach Hires	DPS Mini-competition	ongoing	£ 3,500,000
DPS: Education Taxis & Minibuses	DPS Mini-competition	ongoing	£ 27,000,000
Secure Care Transport Framework	Fife Council Contract	01/01/2023	£ 180,000
Social Work Taxis Framework	Fife Council Contract	01/08/2023	£ 8,000,000
DPS: North Fife School Bus Services	DPS Mini-competition	15/08/2023	£ 9,700,000
DPS: North Fife Local Bus Services	DPS Mini-competition	15/08/2023	£ 7,100,000
DPS: South Fife Local Services	DPS Mini-competition	15/08/2023	£ 3,800,000
DPS: South Fife School Services	DPS Mini-competition	15/08/2023	£ 17,200,000
Education Taxi & Minibus Framework	Fife Council Contract	01/08/2024	£ 2,000,000
DPS: Mid Fife Local Services	DPS Mini-competition	19/08/2024	£ 4,400,000
DPS: Mid Fife School Services	DPS Mini-competition	19/08/2024	£ 11,700,000
Transportation Works			
C29 Site Sampling	Fife Council Contract		
C9 Reinstatement of carriageways	Fife Council Contract		£ 2,200,000
Provision of a Tipping Service	Fife Council Contract		£ 360,000
Harbour and Bridge Maintenance	Fife Council Contract		
Construction Materials Category			
Glass	Fife Council Contract		£ 143,400
Ladders	Fife Council Contract	Dec-23	
Electrical Materials	Scotland Excel Framework		£ 9,600,000
Kitchens	Scotland Excel Framework	Feb-23	
Doors	Scotland Excel Framework	Apr-23	

Description	Anticipated Type of Procurement	Anticipated Start of Procurement Activity or Contract Start Date	Anticipated Total Value (where known)
Laminated Wall Panels	Scotland Excel Framework		
Building Materials	Scotland Excel Framework		
Roofing Materials	Scotland Excel Framework		
Sheet & Timber Materials	Scotland Excel Framework		
Fencing Materials	Scotland Excel Framework		
Plumbing Materials	Scotland Excel Framework		£ 4,000,000
Heating Kits	Scotland Excel Framework		£ 5,200,000
Gas Spares	Scotland Excel Framework		£ 900,000
Bathrooms	Scotland Excel Framework		£ 800,000
General Ironmongery	Scotland Excel Framework		
Adhesives, Sealants and Silicones	Scotland Excel Framework		
Paint & Paint Sundries	Scotland Excel Framework		
Decorating Scheme	Scotland Excel Framework		
Fire Extinguishers & Safety Materials	FC Contract/Mini Comp off SXL framework		

Construction Works

Note - those referenced as Building Services Main Contractor are being delivered in-house. Sub-Contract opportunities may be available but there is no guarantee of external delivery requirement outwith existing frameworks/contracts

Dunfermline Learning Campus	Being delivered through Hubco, possibility of sub-contract opportunities	ongoing	£ 120,000,000
Abbeyview Community Centre	Building Services Main Contractor	Q3-2022	£ 7,500,000
Strathkinness Primary School (DSM) - Replace electric heating		Q2 2024	£ 300,000
Anstruther Care Home		Q1 2024	£ 5,307,000
Glenrothes Golf Course - Create New Hub		Q4 2024	£ 650,000
Canongate PS - Electric Heat to Pump Conversion		Q4 2024	£ 500,000
Kirkcaldy Galleries - Renew Roof Coverings/potential redesign of roof and drainage		Q2 -2023	£ 400,000
Cupar Care Home		late 21	£ 5,307,000
Cowdenbeath Leisure Centre - Redesign Phase 2		Nov-21	£ 4,000,000
Levenmouth - Business Units Ph 2		Early 22	£ 2,250,000
Fife Interchange Business Unit		Mid 22	£ 9,000,000
Security Screen and Remote Alarm Service	Scotland Excel Framework		£ 225,000
Timber Panel Construction Framework	Scotland Excel Framework		£ 4,500,000

Description	Anticipated Type of Procurement	Anticipated Start of Procurement Activity or Contract Start Date	Anticipated Total Value (where known)
Grass Sports Pitch Maintenance	Crown Commercial Services Framework		£ 240,000
Civil & Structural Engineering Framework	Fife Council Contract		£ 850,000
Fire Suppression	Scotland Excel Framework		£ 1,200,000
Scaffolding & Associated Services	Fife Council Contract		
Core Cutting Framework Agreement	Fife Council Contract		
Minor Builder Works	Scotland Excel Framework	late 22	£ 1,200,000
Drainage	Scotland Excel Framework		
Heating Installations	Fife Council Contract		£ 15,000,000
Electrical Testing & Rewiring	Fife Council Contract	Early 23	£ 16,000,000
Kitchen Installations Services	Fife Council tender/CCS Call off	Early 23	£ 3,600,000
New Build Residential Construction	Scotland Excel Framework	Early 23	
Building Construction Consultancy	Fife Council Contract		£ 100,000,000
Street Lighting Materials	Scotland Excel Framework	Q3 2023	
Repair, Maintenance & Refurbishment	Scotland Excel Framework		£ 300,000
ICT			
Note - there is no guarantee that these will be progressed - these entries are at pre-assessment stage and will go through an internal TIME review to determine if, when and how they will proceed.			
Adobe AAG ETLA 3 Year Subscription	Framework Direct CallOff	28/03/2023	
Adobe VIP Agreement	Framework Direct CallOff		
ANPR (Recycling Centres)	Fife Council Contract		
Articulate	Fife Council Contract	27/12/2022	
Asset Inventory Capture	Framework Direct Call Off	30/09/2023	
Assyst	Framework Direct CallOff	31/11/2022	
Auto Desk Subscription	Fife Council Contract	19/03/2022	
Blue Badges	Framework Direct CallOff	31/12/2022	
Business Objects Maintenance	Framework Direct CallOff	18/12/2027	
Cashless Catering & Online Payments	Framework Direct CallOff	31/01/2023	
Catering Management Solution	Framework Direct CallOff	30/04/2025	
Civica Payments	Framework Direct CallOff	31/01/2022	
CivicaAPP (was FLARE)	Fife Council Contract	31/03/2023	
Cloud Based Payments Service	Framework Direct CallOff	28/02/2023	
Community Benefits - Cenefits System	Framework Direct CallOff	01/02/2023	
Commvault - Commvault licenses	Framework Direct CallOff	30/06/2023	
Conquest License Renewal - Transportation -	Framework Direct CallOff	28/02/2023	
Corporate Information Request System - AXLR8.com	Framework Direct CallOff	17/08/2023	
Employee App	Framework Direct CallOff	06/03/2023	
Collections Management System	Framework Direct CallOff	01/04/2023	
Enterprise Forms Server eForm System	Framework Direct CallOff	30/06/2023	

Description	Anticipated Type of Procurement	Anticipated Start of Procurement Activity or Contract Start Date	Anticipated Total Value (where known)
Evalu8	Framework Direct CallOff	22/01/2023	
Excel4Apps	Framework Direct CallOff	23/01/2023	
Fixed Telephony	Framework Direct CallOff	24/01/2023	
Fully Managed Education MDM	Framework Direct CallOff	18/10/2024	
IT Factoring System	Framework Direct CallOff	31/01/2023	
Leisure Management System	Framework Direct CallOff	30/11/2027	
Lone and remote working solution with integrated alarm receiving centre	Framework Direct CallOff	31/03/2025	
Microsoft Campus Agreement	Framework Direct CallOff	31/05/2023	
Voice & Core Network Support	Framework Direct CallOff	30/11/2022	
Mobile Services	Framework Direct CallOff	30/09/2023	
Dynatrace	Framework Direct CallOff	29/07/2023	
Netloan	Framework Direct CallOff	28/11/2022	
Promaster	Framework Direct CallOff	30/11/2022	
IES	Framework Direct CallOff	18/12/2022	
Oracle Consultancy for Oracle Cloud	Framework Direct CallOff	31/01/2023	
RentSense	Fife Council Contract	24/03/2023	
Isoma	Framework Direct CallOff	29/03/2023	
Orbis - Council tax system	Framework Direct CallOff	31/03/2023	
RingGo - cashless parking	Framework Direct CallOff	31/03/2023	
Imperial Parking	Framework Direct CallOff	31/03/2023	
IDOX	Framework Direct CallOff	31/03/2023	
Infoblox	Framework Direct CallOff	31/03/2023	
PowerSuite	Framework Direct CallOff	31/03/2023	
TotalMobile	Framework Direct CallOff	31/03/2023	
Sypro	Framework Direct CallOff	31/03/2023	
Tranman - Fleet Management	Framework Direct CallOff	31/03/2023	
Parents Evening Booking System	Framework Direct CallOff	31/03/2023	
Visual Files	Framework Direct CallOff	31/03/2023	
Oracle Software Support	Framework Direct CallOff	31/03/2023	
HL1 / Tamis	Framework Direct CallOff	31/03/2023	
PGSA (Ordnance Survey)	Framework Direct CallOff	31/03/2023	
MyToolkit	Framework Direct CallOff	04/04/2023	
AP Forensics	Framework Direct CallOff	30/04/2023	
Informix	Framework Direct CallOff	30/04/2023	
RedSky Progression	Framework Direct CallOff	30/04/2023	
Project Online / Edison 365	Framework Direct CallOff	30/04/2023	
Democracy Counts	Framework Direct CallOff	30/05/2023	
F5 Switches	Framework Direct CallOff	07/05/2023	
Oracle Hardware Support	Framework Direct CallOff	28/05/2023	
SAN Cisco Support	Framework Direct CallOff	31/05/2023	
PlotBox - bereavement Digitisation	Framework Direct CallOff	27/06/2023	
Learning Nexus	Framework Direct CallOff	31/07/2023	
NNDR / FQV	Framework Direct CallOff	31/07/2023	
ESRI GIS	Framework Direct CallOff	26/08/2023	

Description	Anticipated Type of Procurement	Anticipated Start of Procurement Activity or Contract Start Date	Anticipated Total Value (where known)
Yotta	Framework Direct CallOff	31/08/2023	
PSOS - Parks Street and Open Spaces system	Framework Direct CallOff	30/10/2023	
Pentana	Framework Direct CallOff	12/11/2023	
Citizens Access (Orbis)	Framework Direct CallOff	31/12/2023	
Oracle Inventory & Warehouse Management	Extension of agreement	02/01/2024	
Oracle Cloud	Extension of agreement	02/01/2024	
PTX Bottomline	Framework Direct CallOff	28/02/2024	
Microsoft SQL	Framework Direct CallOff	31/03/2024	
Community Equipment Management Solution	Framework Direct CallOff	31/03/2024	
SIP Pipe	Framework Direct CallOff	31/03/2024	
Gartner Subscription	Framework Direct CallOff	31/03/2024	
Badgemaker	Framework Direct CallOff	20/04/2024	
ForcePoint	Framework Direct CallOff	31/05/2024	
SolarWinds	Framework Direct CallOff	29/06/2024	
Housing Property Factoring	Framework Direct CallOff	05/07/2024	
Small Plant & Tool Hire Solution	Framework Direct CallOff	11/07/2024	
Cisco Hardware and Software Support	Framework Direct CallOff	01/12/2022	

Annual Procurement Report Template

[NOTE: reference to contract is also to be construed as meaning a framework agreement]

1. Organisation and report details	
a) Contracting Authority Name	Fife Council
b) Period of the annual procurement report	1 st April 2021 – 31 st March 2022
c) Required by s18 Procurement Reform (Scotland) Act 2014 to prepare an annual procurement report? (Yes / No)	Yes
2. Summary of Regulated Procurements Completed	
a) Total number of regulated contracts awarded within the report period	140
b) Total value of regulated contracts awarded within the report period	£410.75m
c) Total number of unique suppliers awarded a place on a regulated contract awarded during the period	377
i) how many of these unique suppliers are SMEs	293
ii) how many of these unique suppliers how many are Third sector bodies	14
3. Review of Regulated Procurements Compliance	
a) Number of regulated contracts awarded within the period that complied with your Procurement Strategy	139
b) Number of regulated contracts awarded within the period that did not comply with your Procurement Strategy	1
4. Community Benefit Requirements Summary	
Use of Community Benefit Requirements in Procurement:	
a) Total Number of regulated contracts awarded with a value of £4 million or greater.	23
b) Total Number of regulated contracts awarded with a value of £4 million or greater that contain Community Benefit Requirements.	6
c) Total Number of regulated contracts awarded with a value of less than £4 million that contain Community Benefit Requirements	29
Key Contract Information on community benefit requirements imposed as part of a regulated procurement that were fulfilled during the period:	
d) Number of Jobs Filled by Priority Groups (Each contracting authority sets its own priority groups)	67.82
e) Number of Apprenticeships Filled by Priority Groups	138.14

f) Number of Work Placements for Priority Groups	529
g) Number of Qualifications Achieved Through Training by Priority Groups	1
h) Total Value of contracts sub-contracted to SMEs	£223,282
i) Total Value of contracts sub-contracted to Social Enterprises	N/A FC does not record this (included in above figure)
j) Total Value of contracts sub-contracted to Supported Businesses	N/A FC does not record this (included in above figure)
k) Other community benefit(s) fulfilled	£8,838
5. Fair Work and the real Living Wage	
a) Number of regulated contracts awarded during the period that included a Fair Work First criterion.	130
b) Number of unique suppliers who have committed to pay the real Living Wage in the delivery of a regulated contract awarded during the period.	203
c) Number of unique suppliers who are accredited Living Wage employers and were awarded a regulated contract during the period.	52
d) Number of unique suppliers who have signed up to the Scottish Business Pledge and were awarded a regulated contract during the period.	11
6. Payment performance	
a) Number of valid invoices received during the reporting period.	313,850
b) Percentage of invoices paid on time during the period ("On time" means within the time period set out in the contract terms.)	94%
c) Number of regulated contracts awarded during the period containing a contract term requiring the prompt payment of invoices in public contract supply chains.	140
d) Number of concerns raised by sub-contractors about the timely payment of invoices within the supply chain of public contracts.	0

7. Supported Businesses Summary

a) Total number of regulated contracts awarded to supported businesses during the period	2
b) Total spend with supported businesses during the period covered by the report, including:	£344,435
i) spend within the reporting year on regulated contracts	Included in above
ii) spend within the reporting year on non-regulated contracts	Included in above

8. Spend and Savings Summary

a) Total procurement spend for the period covered by the annual procurement report.	£502.74m
b) Total procurement spend with SMEs during the period covered by the annual procurement report.	£254.08m
c) Total procurement spend with third sector bodies during the period covered by the report.	£63.93m
d) Percentage of total procurement spend through collaborative contracts.	29%
e) Total targeted cash savings for the period covered by the annual procurement report	£20m of benefits (cashable and non-cashable) over 3 years
i) targeted cash savings for Cat A contracts	N/A
ii) targeted cash savings for Cat B contracts	N/A
iii) targeted cash savings for Cat C contracts	N/A
f) Total delivered cash savings for the period covered by the annual procurement report	£4.376m
i) delivered cash savings for Cat A contracts	N/A
ii) delivered cash savings for Cat B contracts	N/A
iii) delivered cash savings for Cat C contracts	N/A
g) Total non-cash savings value for the period covered by the annual procurement report	£3.608m

9. Future regulated procurements

a) Total number of regulated procurements expected to commence in the next two financial years	274
b) Total estimated value of regulated procurements expected to commence in the next two financial years	£830m

3rd November, 2022

Agenda Item No.12

2022/23 Revenue Monitoring Projected Outturn

Report by: Eileen Rowand, Executive Director, Finance and Corporate Services
Ken Gourlay, Executive Director, Enterprise & Environment

Wards Affected: All

Purpose

The purpose of this report is to give members an update on the projected outturn financial position for the 2022/23 financial year as at August, for the areas in scope of the Finance, Economy & Corporate Services Scrutiny Committee.

Recommendations

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

Resource Implications

None.

Legal & Risk Implications

There are no direct legal implications arising from this report.

Impact Assessment

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

Consultation

None.

1.0 Background

- 1.1 The report summarises the projected outturn position for 2022/23, taking into account the actual expenditure incurred, and provides an explanation of the main budget variances at section 3.
- 1.2 Section 4 of the report summarises the progress on delivery of approved budget savings and provides an explanation of any variances to the delivery of savings target.
- 1.3 Variances occur for a number of reasons and variances in budget are not always correlated to delivery of savings targets.

2.0 Issues

2.1 Projected Outturn

- 2.1.1 The projected underspend for the areas falling under the scope of this committee is £0.828m. A summary of the 2022/23 projected out-turn for the areas under the scope of this committee is detailed in Appendix 1. This shows projected expenditure against budget across the service headings within the Directorate. It should be noted that the balances are extracted from the ledger system and are shown as rounded thousands. This may mean that there are some rounding differences contained within the appendices, but these are immaterial values that do not impact on the overall financial position. The following paragraphs provide a brief explanation of the main areas where there are significant variances (+/-£0.250m) to budgets.

3.0 Major Variances

- 3.1 Planning underspend of (£0.284m), movement of (£0.052m)
The variance is mainly due to part year vacancies and recruitment is ongoing to relieve pressure on the workforce of increased volume of Planning applications and related work.
- 3.2 Business & Employability underspend of (£0.542m), movement of (£0.293m)
The variance is mainly due to an underspend on Employability of (£0.284m) as a result of focussed delivery on short term externally funded projects linked to the economic recovery from Covid-19. Underspend and movement of (£0.192m) is a contribution to accrued administrative costs from participation in the DWP Kickstart programme and further underspend of (£0.076m) from part year vacancies.

4.0 Progress on Budget Savings

- 4.1 This section usually details revenue budget savings for the areas falling under the scope of the Finance, Economy and Corporate Services Scrutiny Committee, detailing achievements against the current year approved budget savings.

4.2 There are currently no service savings to manage within the financial year 2022/23.

5.0 Conclusions

5.1 The projected outturn position for the areas under the scope of the Finance, Economy and Corporate Services Scrutiny Committee is a net underspend of £0.828m (28.36%).

List of Appendices

1 Projected Outturn 2022/23 Summary

Background Papers

None

Report Contact

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BUDGET MONITORING REPORT SUMMARY 2022-23 FINANCE, ECONOMY & CORPORATE SERVICES							Appendix 2	
	CURRENT BUDGET 2022-23 £m	COVID PROJECTION 2022-23 £m	NON-COVID PROJECTION 2022-23 £m	FORECAST 2022-23 £m	FORECAST VARIANCE £m	FORECAST VARIANCE %	PREVIOUS REPORTED VARIANCE £m	MOVEMENT FROM PREVIOUS REPORTED VARIANCE £m
TOTAL COST OF SERVICES	38.776	0.000	37.948	37.948	(0.828)	-2.14%	(0.483)	(0.345)
LESS: CORPORATELY MANAGED ITEMS	26.864	0.000	26.864	26.864	0.000	0.00%	0.000	0.000
SERVICE MANAGED NET BUDGET	11.912	0.000	11.084	11.084	(0.829)	(0.000)	(0.483)	(0.345)
ANALYSIS OF SERVICE MANAGED BUDGET								
EE EXECUTIVE DIRECTOR	0.558	0.000	0.555	0.555	(0.002)	-0.37%	(0.002)	0.000
PLANNING	1.255	0.000	0.972	0.972	(0.284)	-22.62%	(0.232)	(0.052)
BUSINESS & EMPLOYABILITY SERVICE	10.099	0.000	9.557	9.557	(0.542)	-5.37%	(0.249)	(0.293)
	11.912	0.000	11.084	11.084	(0.828)	-28.36%	(0.483)	(0.345)

3rd November, 2022

Agenda Item No. 13

2022/23 Capital Monitoring Projected Outturn

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

Ken Gourlay, Executive Director, Enterprise & Environment

Wards Affected: All

Purpose

The purpose of this report is to provide an update on the Capital Investment Plan and advise on the projected financial position for the 2022/23 financial year as at August, for the areas in scope of the Finance, Economy & Corporate Services Scrutiny Committee.

Recommendation(s)

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

Resource Implications

None.

Legal & Risk Implications

None.

Impact Assessment

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

Consultation

None.

1.0 Background

- 1.1 Based on current information, this report summarises the projected capital outturn for the areas falling under the scope of this Committee for 2022/23. At this stage projected expenditure is £7.673m, representing 82% of the approved capital programme for 2022/23.
- 1.2 Appendix 1 shows an analysis of specific projects in the current capital investment plan which have a budget greater than £1.000m and analyses total project cost rather than only in year spend.
- 1.3 Appendix 2 details the forecast expenditure against budget for each project, along with any associated income.

2.0 Issues, Achievements & Financial Performance

2.1 Key Issues / Risks

- 2.1.1 Appendix 1 details the total cost forecast position for all capital projects within the areas under the scope of the Committee with an overall value of £1.000m and over. The key risks associated with the major projects are noted below.
- 2.1.2 There is a risk across the Capital Investment Plan that both the timing and the costs of projects continue to be adversely affected as a result of the current economic climate following the response to COVID-19, EU-Exit and current geo political risks in Europe. Throughout the programme issues are continuing to be identified in relation to the supply of construction materials which are resulting in delays to projects, which in turn could lead to increased slippage and increased costs. However, the overall future impact of this is difficult to predict with any degree of certainty and the projected outturn in this report for 2022-23 relate to projects that are currently in progress with contracts that are already agreed. That said, monitoring of the impact of any additional costs, impact on timescales and associated risks is ongoing. The known impact on timing of delivery of projects has been built in to the rephased plan and the overall scale of any additional costs or further delays will be kept under review in future reports and also through the upcoming review of the Capital Investment Plan.
- 2.1.3 COVID-19 restrictions have eased, however, there remains a risk that new variants emerge which could impact on project delivery in future years. These potential risks cover all aspects of the capital plan including both General Fund and the HRA.

2.2 Major Projects – Potential Risks and Actions

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

2.3 Financial Performance – 2022/23 Projected Outturn

- 2.3.1 Appendix 2 provides a summary of the projected outturn for each project for the financial year 2022/23. The appendix shows a projected outturn of £7.673m against a Capital Investment plan of £9.302m, a spending level of 82%.

2.3.2 Appendix 2 also provides a summary of the projected outturn for each project for the financial year 2022/23 for capital income. The appendix shows a projected outturn of £3.834m against a capital income budget of £4.717m.

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

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

2.4 Significant Variances

2.4.1 Fife Industrial Innovation Investment Programme £1.050m slippage and underspend. Slippage of £0.574m has occurred at Glenrothes Flemington Road as redesign of the project is required in order to meet procurement regulations. A site acquisition at Dalgety Bay will slip to 2023 resulting in slippage of £0.321m. There has also been an underspend of £0.277m on groundworks where full contingency was not required at Lochgelly.

3.0 Conclusions

3.1 The total 2022/23 approved programme for the areas in scope of the Finance, Economy and Corporate Services Scrutiny Committee is £9.302m. The projected level of expenditure is £7.673m, which represents 82% of the total programme, resulting in slippage of £1.629m.

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

List of Appendices

1. Total Cost Monitor
2. Capital Monitoring Report by Service

Report Contact

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FIFE COUNCIL
 FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE
 ENTERPRISE AND ENVIRONMENT
 CAPITAL INVESTMENT PLAN 2021-31
 TOTAL COST MONITOR - MAJOR CAPITAL PROJECTS

Project	Service	Original Approved Budget £m	Current Project Budget £m	Total Projected Outturn £m	Variance £m	Variance %	Current Project Status	Expected Project Completion Date
Fife Interchange Business Units - Phase 1 & 2	Inclusive Growth and Jobs	8.130	11.068	11.068	-	0.00%	Current Project	2024-25
John Smith Business Park Business Units	Inclusive Growth and Jobs	3.644	5.517	5.517	-	0.00%	Current Project	2026-27
Total Major Projects over £5.000m		11.774	16.585	16.585	-	0.00%		
Levenmouth Business Units - Phase 1	Inclusive Growth and Jobs	1.602	1.736	1.736	-	0.00%	Current Project	2023-24
Queensway Development Site	Inclusive Growth and Jobs	2.113	3.376	3.376	-	0.00%	Complete	2022-23
Dunnikier Business Units	Inclusive Growth and Jobs	2.140	2.268	2.268	-	0.00%	Complete	2022-23
Queensway Refurbishment	Inclusive Growth and Jobs	1.380	2.000	2.000	(0.000)	-0.01%	Current Project	2023-24
Fife Interchange North Site Servicing	Inclusive Growth and Jobs	3.046	1.453	1.453	-	0.00%	Current Project	2022-23
Levenmouth Business Units - Phase 2	Inclusive Growth and Jobs	2.898	4.310	4.310	-	0.00%	Current Project	2025-26
Dalgety Bay Business Units - Phase 2	Inclusive Growth and Jobs	2.853	4.410	4.410	-	0.00%	Current Project	2023-24
Kirkcaldy Esplanade Phase 2	Inclusive Growth and Jobs	1.500	1.843	1.843	-	0.00%	Current Project	2024.25
Total Major Projects over £1.000m		17.532	21.397	21.397	(0.000)	0.00%		
Total Major Projects		29.306	37.982	37.982	(0.000)	0.00%		

Expenditure	Current Budget £m	Actual to Date £m	Projected Outturn £m	Projected Variance £m	Projected Outturn as % of Plan
Regeneration - Town Centres	0.995	0.367	0.835	(0.160)	84%
Business Premises Refurbishment Programme	0.407	0.027	0.382	(0.025)	94%
Growing the Economy	1.250	0.050	0.856	(0.394)	68%
Place Based Investment Programme	1.540	0.155	1.540	-	100%
Vacant/Derelict Land	0.398	0.017	0.398	-	100%
Industrial Investment Programme	4.712	1.945	3.661	(1.050)	78%
TOTAL BUSINESS & EMPLOYABILITY SERVICES	9.302	2.561	7.673	(1.629)	82%
TOTAL EXPENDITURE	9.302	2.561	7.673	(1.629)	82%

Income	Current Budget £m	Actual to Date £m	Projected Outturn £m	Projected Variance £m	Projected Outturn as % of Plan
Regeneration - Town Centres	(0.382)	-	(0.382)	-	100%
Growing the Economy	-	0.170	-	-	0%
Place Based Investment Programme	(0.140)	(2.748)	(0.140)	-	0%
Industrial Investment Programme	(4.195)	(0.633)	(3.312)	0.883	79%
TOTAL BUSINESS & EMPLOYABILITY SERVICES	(4.717)	(3.211)	(3.834)	0.883	81%
TOTAL INCOME	(4.717)	(3.211)	(3.834)	0.883	81%

3rd November 2022
Agenda Item No. 14

2022/23 Revenue Monitoring Projected Outturn – Finance and Corporate Services

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

Wards Affected: All

Purpose

The purpose of this report is to give members an update on the projected outturn financial position for 2022/23 for the Finance and Corporate Services Directorate.

Recommendations

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

Resource Implications

None.

Legal & Risk Implications

There are no direct legal implications arising from this report.

Impact Assessment

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

Consultation

None.

1.0 Background

The report summarises the projected outturn position for 2022/23, taking into account the actual expenditure incurred, and provides an explanation of the main budget variances at section 3.

2.0 Issues

2.1 Projected Outturn

2.1.1 Based on current information for the Finance and Corporate Services Directorate, of a service managed net expenditure budget of £47.824m the position across all Services is a projected expenditure of £48.759m resulting in a projected net overspend of £0.935m (1.95%). This projected overspend includes COVID-19 financial pressures of £0.955m.

2.1.2 Also, within the Finance and Corporate Services Directorate, there is a net expenditure budget of £2.113m for Benefits & Council Tax and Miscellaneous Services, which is currently forecasting a net underspend of £1.171m (55.42%). This budget sits within the Directorate but is managed corporately. Therefore, the Services within Finance and Corporate Services do not have a direct influence on these budgets.

2.1.3 Appendix 1 shows projected expenditure against budget across the various Services within the Finance and Corporate Services Directorate. Section 3 provides a brief explanation of the main areas where there are significant variances (+/-£0.250m) between planned and projected expenditure and income across service managed budgets.

2.1.4 The Policy and Co-ordination Committee has previously instructed Services to contain expenditure within the approved budget provision and noted that Executive Directors were actively considering the corrective action that required to be taken to eliminate overspends in their area of responsibility.

3.0 Major Variances

3.1 Directorate position – Variance (£0.236m) underspend

3.1.1 Directorate Service Managed position £0.935m overspend, movement £0.138m

Of the total projected overspend within the F&CS Directorate, £0.955m relates to the impact of COVID-19. Included in these COVID-19 pressures are estimated costs that relate to home and remote working, the workstyles project and digital inclusion of £0.374m. The balance of this projected overspend is mainly due to additional staffing resources and delayed delivery of previously agreed savings and equates to £0.551m.

Within the service managed budget for the Finance and Corporate Services Directorate there is a net underspend of (£0.020m). Business Technology Solutions (BTS) are projecting an overspend of £0.474m which is mainly due to the delayed delivery of previously agreed savings. There has been an increased demand on BTS and therefore a decision was made not to advance the planned reduction in staff. This

was linked to the agreement of the new ICT Investment Strategy to allow new technology to be implemented across the Council. Actions are being taken at a Directorate level to address the financial impact of these delayed savings. Revenue and Commercial Services are projecting an underspend of (£0.381m) which mainly relates to staffing vacancies due to recruitment issues.

3.1.2 Housing Benefits (£1.171m) underspend, movement (£0.203m)

The underspend mainly relates to a projected reduction in Housing Benefit costs due to the incremental movement of benefit claimants nationally from Housing Benefits to Universal Credit.

4.0 Progress on Budget Savings

4.1 Appendix 2 provides details of revenue budget savings for the areas falling under the scope of the Finance and Corporate Services Directorate, detailing achievements against the current year approved budget savings. The appendix details:

- the 3 year budget period for which the savings were approved
- the title of each saving
- the savings target relevant to the current financial year
- the value of saving forecast as deliverable for the financial year
- a Red/Amber/Green Status for each saving
- details of any substitute savings

4.2 All savings have been categorised using a Red/Amber/Green status and these are described as follows:

Green – No issues and saving is on track to be delivered

Amber – There are minor issues or minor reduction in the value of saving, or delivery of the saving is delayed

Red – Major issues should be addressed before any saving can be realised

4.3 Where a saving is no longer deliverable in the current year it is expected that substitute savings are identified to ensure that costs remain within budget overall. Where this is the case, the original saving will be categorised red or amber and a substitute saving will be identified. The substitute saving will be categorised as green and identified in the tracker as a substitute.

4.4 There is one saving for Finance & Corporate Services which relates to Revenue & Commercial Services and is currently at green status (£0.040m).

5.0 Conclusions

5.1 The projected outturn position for the service managed budget within the Finance and Corporate Services Directorate is a net overspend of £0.935m (1.95%), which includes COVID-19 financial pressures of £0.955m. The projected outturn position for Benefits & Council Tax and Miscellaneous Services is a net underspend of £1.171m (55.42%).

List of Appendices

- 1 Projected Outturn 2022/23 - Detail
- 2 Approved 2022/23 Savings

Background Papers

None

Report Contact

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BUDGET MONITORING REPORT SUMMARY 2022-23 FINANCE, ECONOMY & CORPORATE SERVICES					Appendix 1	
FINANCE AND COPORATE SERVICES	CURRENT BUDGET 2022-23 £m	FORECAST 2022- 23 £m	FORECAST VARIANCE £m	FORECAST VARIANCE %	PREVIOUS REPORTED VARIANCE £m	MOVEMENT FROM PREVIOUS REPORTED VARIANCE £m
TOTAL COST OF SERVICES	60.630	60.394	(0.236)	-0.39%	(0.171)	(0.065)
LESS: CORPORATELY MANAGED ITEMS	10.693	10.693	(0.000)	-0.00%	0.000	(0.000)
SERVICE MANAGED NET BUDGET	49.937	49.701	(0.236)	(0.000)	(0.171)	(0.065)
<u>ANALYSIS OF SERVICE MANAGED BUDGET</u>						
FINANCE & CORPORATE SERVICES MANAGEMENT	1.122	1.240	0.118	10.55%	0.141	(0.023)
ASSESSORS SERVICE	1.756	1.717	(0.039)	-2.19%	0.021	(0.060)
FINANCE	2.671	2.689	0.018	0.67%	0.133	(0.115)
AUDIT & RISK MANAGEMENT SERVICE	0.771	0.683	(0.088)	-11.43%	(0.087)	(0.002)
REVENUE & COMMERCIAL SERVICES	14.662	14.455	(0.208)	-1.42%	(0.369)	0.162
HUMAN RESOURCES	6.287	6.457	0.171	2.72%	0.105	0.066
BUSINESS TECHNOLOGY SOLUTIONS	15.682	16.495	0.813	5.18%	0.760	0.053
LEGAL & DEMOCRATIC SERVICES	4.873	5.022	0.150	3.07%	0.093	0.057
	47.824	48.759	0.935	1.95%	0.797	0.138
BENEFITS & COUNCIL TAX	1.986	0.815	(1.171)	-58.95%	(0.969)	(0.203)
MISCELLANEOUS SERVICES	0.127	0.127	0.000	0.00%	0.000	0.000
	2.113	0.942	(1.171)	-55.42%	(0.969)	(0.203)
FINANCE AND CORPORATE SERVICES	49.937	49.701	(0.236)	-0.47%	(0.171)	(0.065)

FIFE COUNCIL
TRACKING APPROVED 2022-23 SAVINGS
FINANCE & CORPORATE SERVICES
AUGUST 2022

Area	Approved Budget Year	Savings Reference	Title of Savings Proposal	Savings Target £m	Forecast £m	(Under) / Over £m	Rag Status
Finance & Corporate Services	2021-24	2021-FC-04	Business Management Innovation Unit - Reduce Staff	0.040	0.040	0.00	Green
Grand Total				0.040	0.040	0.00	

Rag Status Key:-

Green - No issues and saving is on track to be delivered

Amber - There are minor issues or minor reduction in the value of saving, or delivery of the saving is delayed

Red - Major issues should be addressed before any saving can be realised

Summary			
Rag Status	Savings Target £m	Actual £m	(Under)/ Over £m
Green	0.040	0.040	0.000
Amber	0.000	0.000	0.000
Red	0.000	0.000	0.000
Total	0.040	0.040	0.000

3rd November 2022
Agenda Item No. 15

2022/23 Capital Monitoring Projected Outturn – Finance and Corporate Services Directorate

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

Wards Affected: All

Purpose

The purpose of this report is to provide an update on the Capital Investment Plan and advise on the projected financial position for the 2022/23 financial year for the Finance and Corporate Services Directorate.

Recommendation(s)

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

Resource Implications

None.

Legal & Risk Implications

None.

Impact Assessment

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

Consultation

None.

1.0 Background

- 1.1 Based on current information, this report summarises the projected capital outturn for the Finance and Corporate Services Directorate for 2022/23. At this stage, it is forecast that expenditure will be £3.228m against a budget of £3.323m, representing 97% of the approved capital programme for 2022/23.
- 1.2 Appendix 1 shows an analysis of specific projects in the current capital investment plan which have a budget greater than £1m and analyses total project cost rather than only in year spend.
- 1.3 Appendix 2 details the forecast expenditure against budget for each project. A brief explanation of any significant forecast variances is provided at section 2 within this report.

2.0 Issues, Achievements & Financial Performance

2.1 Key Issues / Risks

- 2.1.1 Appendix 1 details the total cost forecast position for all capital projects within the Finance and Corporate Services Directorate with an overall value of £1m and over. The key risks associated with the major projects are noted below.

2.2 Major Projects – Potential Risks and Actions

- 2.2.1 There is a risk across the Capital Investment Plan that both the timing and the costs of projects continue to be adversely affected as a result of the current economic climate following the response to COVID-19, EU-Exit and current geo political risks in Europe. Throughout the programme issues are continuing to be identified in relation to the supply of construction materials which are resulting in delays to projects, which in turn could lead to increased slippage and increased costs. However, the overall future impact of this is difficult to predict with any degree of certainty and the projected outturn in this report for 2022-23 relate to projects that are currently in progress with contracts that are already agreed. That said, monitoring of the impact of any additional costs, impact on timescales and associated risks is ongoing. The known impact on timing of delivery of projects has been built in to the rephased plan and the overall scale of any additional costs or further delays will be kept under review in future reports and also through the upcoming review of the Capital Investment Plan.
- 2.2.2 COVID-19 restrictions have eased, however, there remains a risk that new variants emerge which could impact on project delivery in future years. These potential risks cover all aspects of the capital plan including both General Fund and the HRA.
- 2.2.3 There are no additional or new risks arising in the current reporting period from any of the major projects being progressed. There is one major project with a budget of over £1m for Finance and Corporate Services. This project relates to the Local Area Network (LAN) as detailed in Appendix 1. The total budget is £7.308m over the life of the project. The projected spend for this project is on budget.

2.3 Financial Performance – 2022/23 Projected Outturn

- 2.3.1 Appendix 2 provides a summary of the projected outturn for each project for the financial year 2022/23.
- 2.3.2 Slippage is the term used to describe projects that are expected to spend less than the budget allocation in a particular year due to a delay in timing on the delivery of the project. This is not uncommon in the capital programme and the reasons for this can be wide and varied. Advancement is the term used to describe projects that are expected to spend more than the budget allocation in a particular year due to an acceleration of the budget from future years.
- 2.3.3 There are no variances to report at this stage.

3.0 Conclusions

- 3.1 The total 2022/23 approved programme for the Finance and Corporate Services Directorate is £3.323m, with a forecasted level of expenditure of £3.228m.
- 3.2 The management of capital resources require us to look across financial years, as well as within individual years. The current year performance is only a snapshot of the existing plan and the Directorate will adjust expenditure levels within future years of the plan to accommodate the advancement or slippage of projects.

List of Appendices

1. Total Cost Monitor
2. Capital Monitoring Report

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FIFE COUNCIL
 FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE
 FINANCE & CORPORATE SERVICES
 CAPITAL INVESTMENT PLAN 2021-31
 TOTAL COST MONITOR - MAJOR CAPITAL PROJECTS

Project	Service	Original Approved Budget £m	Current Project Budget £m	Total Projected Outturn £m	Variance £m	Variance %	Current Project Status	Expected Project Completion Date
Local Area Network	Maintaining Our Assets		7.308	7.308	-	0.00%	Current Project	2022-23
Total Major Projects over £5.000m		-	7.308	7.308	-	0.00%		

**FIFE COUNCIL
 FINANCE, ECONOMY AND CORPORATE SERVICES SCRUTINY COMMITTEE
 FINANCE & CORPORATE SERVICES
 CAPITAL INVESTMENT PLAN 2021-31
 MONITORING REPORT 2022-23**

Appendix 2

Expenditure	Current Budget £m	Actual to Date £m	Projected Outturn £m	Projected Variance £m	Projected Outturn as % of Plan
BTS Capital	2.000	0.466	2.000	-	100%
BTS Rolling Programme	1.323	0.292	1.228	(0.095)	93%
TOTAL FINANCE & CORPORATE SERVICES	3.323	0.758	3.228	(0.095)	97%
TOTAL EXPENDITURE	3.323	0.758	3.228	(0.095)	97%

3rd November, 2022

Agenda Item No. 16

Workplan

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

Wards Affected: All

Purpose

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

Recommendation(s)

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

Resource Implications

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

Legal & Risk Implications

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

Impact Assessment

None required for this paper.

Consultation

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

1.0 Background

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

2.0 Conclusions

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

List of Appendices

1. Workplan

Background Papers

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

None

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Finance, Economy and Corporate Services Scrutiny Committee of 26 January 2023			
Title	Service(s)	Contact(s)	Comments
Planning Performance Framework (2021-2022): Ministers Feedback – Planning - - annual report – last presented to ETSP&T March 22 –	Planning	Pam Ewen	Annual report – last presented to ETSP&T March 22 - Contacts Pam Ewen, Alastair Hamilton - from Economy, Tourism, Strategic Planning & Transportation Committee
Revenue Monitoring Report	Finance and Corporate Services	Jackie Johnstone, Donna Grieve	
Capital Monitoring Report	Finance and Corporate Services	Jackie Johnstone, Donna Grieve, Ashleigh Allan	

Finance, Economy and Corporate Services Scrutiny Committee of 30 March 2023			
Title	Service(s)	Contact(s)	Comments
Revenue Monitoring Report	Finance and Corporate Services		
Capital Monitoring Report	Finance and Corporate Services	Jackie Johnstone, Donna Grieve, Ashleigh Allan	
Digital Progress in Local Government - Update on Fife Position	Economy, Planning and Employability	Morag Millar	Update report in 12 months - agreed at meeting 1/6/21. - from Environment, Finance and Communities Scrutiny
Tayside City Region Deal	Economy, Planning and Employability	Morag Millar	Update report for Committee when available.

Finance, Economy and Corporate Services Scrutiny Committee of 15 June 2023			
Title	Service(s)	Contact(s)	Comments
Revenue Monitoring Report	Finance and Corporate Services	Jackie Johnstone, Ashleigh Allan, Donna Grieve	
Capital Monitoring Report	Finance and Corporate Services	Jackie Johnstone, Donna Grieve, Ashleigh Allan	

Unallocated			
Title	Service(s)	Contact(s)	Comments
Bad Debts 2022-23	Economy, Planning and Employability	Morag Millar	Expected Sept 23.
Finance and Corporate Services Directorate Performance Report 2022-23	Economy, Planning and Employability	Morag Millar	Expected Sept 2023
Business Gateway Fife Annual Performance 2022-23	Economy, Planning and Employability	Morag Millar	Expected Sept 2023
Enterprise and Environment Directorate: Planning Services Performance Reporting	Economy, Planning and Employability	Morag Millar	Expected Sept 2023
Annual Health and Safety Report 2022-23	Economy, Planning and Employability	Morag Millar	Expected Sept 2023
Annual Procurement Report 2022-23	Economy, Planning and Employability	Morag Millar	Expected Sept 2023