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**Harborough District Council,**

**Hinckley and Bosworth Borough Council,**

**North West Leicestershire District Council,**

***Working in Partnership to provide better services...***

Meeting Committee

Leicestershire Partnership Revenues & Benefits Joint

Time/Date

3.30 pm on Thursday, 18 JANUARY 2024

Location Council

Council Chamber - North West Leicestershire District

Officer to contact

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Councillor P Beadle  
Councillor S Bray  
Councillor M Graves

Councillor K Lynch  
Councillor A Woodman  
Councillor M Wyatt

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**LEICESTERSHIRE PARTNERSHIP REVENUES & BENEFITS JOINT COMMITTEE -  
18 JANUARY 2024**

**A G E N D A**

**1. APOLOGIES FOR ABSENCE**

To receive and note any apologies for absence.

**2. DECLARATIONS OF INTEREST**

Under the code of conduct members are reminded that in declaring interests they should make clear the nature of that interest and whether it is a disclosble pecuniary interest, registrable interest or other interest.

**3. MINUTES OF PREVIOUS MEETING (Pages 1 - 2)**

To confirm the minutes of the meeting held on 23 November 2023.

**4. BUDGET SETTING REPORT (Pages 3 - 8)**

Report of the Section 151 Officer

**5. FINANCIAL PERFORMANCE REPORT (Pages 9 - 12)**

Report of the Section 151 Officer

**6. SERVICE PLAN 2024 (Pages 13 - 24)**

Report of the Head of Partnership

**7. PERFORMANCE REPORT (Pages 25 - 32)**

Report of the Head of Partnership

**8. DATES OF FUTURE MEETINGS**

Thursday 21 March 2024 – 3.30pm HBBC, Hinckley  
Thursday 13 June 2024 – 3.30 pm HDC, Harborough

**9. FORWARD PLAN (Pages 33 - 34)**

To note the joint committee's forward plan.

**10. MATTERS FROM WHICH THE PUBLIC MAY BE EXCLUDED**

To consider the passing of a resolution under Section 100A(4) of the Local Government Act 1972 excluding the public from the undermentioned item of business on the grounds that it involves the likely disclosure of exempt information as defined in paragraphs 3 and 10 (the public interest test) of Schedule 12A of the 1972 Act.

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## MINUTES OF THE MEETING OF THE LEICESTERSHIRE PARTNERSHIP REVENUES & BENEFITS JOINT COMMITTEE

23 NOVEMBER 2023 AT 3.30 PM

PRESENT: Cllr Wyatt - Chair  
Cllr KWP Lynch – Vice-Chair  
Cllr Beadle and Cllr Woodman

Also in attendance:

Officers in attendance: Carolyn Bland, Anna Crouch, Julie Kenny, Sally O'Hanlon, Rebecca Valentine-Wilkinson and Ashley Wilson

59. **Apologies for absence**

Apologies were received from Councillor Bray and Councillor Graves.

60. **Declarations of interest**

No additional interests were declared at this meeting.

61. **Minutes of previous meeting**

It was moved by Councillor Lynch, seconded by Councillor Woodman and

RESOLVED – the minutes of the meeting held on 14 September 2023 be confirmed as a correct record.

62. **Financial Performance**

Members were presented with the financial performance for the Partnership for the period April 2023 to September 2023.

After a question from members regarding the reported £15,000 savings on postage, it was confirmed that the Partnership were still communicating by sending out letters, but they were also communicating in other ways, but it was felt that the majority of the savings reported would be savings on postal charges.

63. **Performance Report**

Members received a performance report up to September 2023.

As part of the update members were also informed that the DWP's phased managed migration process from tax credits to universal credit had started last year under a discovery phase. A detailed report would be presented to a future meeting and current advice from DWP was that Local Authorities should not be getting involved with issues. Officers confirmed that communication would be going out to local residents.

As part of the internal audit plan for the Partnership members were informed that Housing Benefits, Council Tax and Business Rates would be the key risks reviewed over the course of the detailed plan.

64. **Forward Plan**

Members noted the forward plan.

65. **Dates of future meetings**

Members noted the future meeting dates.

66. **Matters from which the public may be excluded**

On the motion of Councillor Lynch, seconded by Councillor Woodman, it was

RESOLVED – in accordance with Section 100A(4) of the Local Government Act 1972, the public be excluded from the following item of business on the grounds that it involves the disclosure of exempt information as defined in paragraphs 3 and 10 of Schedule 12A of the 1972 Act.

67. **Future of the partnership**

Members received a verbal update

(The Meeting closed at 3.45 pm)

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CHAIR



# Leicestershire Partnership Revenues & Benefits

2024/25 Proposed Budget

**Joint Committee**

## 1. PURPOSE OF THE REPORT

1.1 To inform the Management Board of the draft budget for 2024/25.

## 2. RECOMMENDATION

2.1 That the 2024/25 budget proposals for the Partnership is approved for agreement by the by the Joint Committee.

## 3. BACKGROUND

3.1 The timetables for budget setting for the Partnership is that the budget will normally be approved prior to the 31st of January each year.

### Budget overview

3.2 In preparing this draft budget for 2024/25 the following factors and assumptions have been considered:

- Actual spend for 2022/23 has been used as an indicator where relevant.
- A provision has been made on salaries a 4% pay award for 2024/25 on the current establishment provided by each Partner.
- In terms of general inflation, no provision has been made other than for contractual increases at RPI.
- Salary costs also include additional costs associated to pension contributions; annual pay increments due during 2024/25.

3.3 The draft 2024/25 budget shows an increase of £188,740 for the Partnership (net of other body contributions) and is detailed below (Table 1).

3.4 The main cause of the increase in 2024/25 is due pay increase and employer costs in relation to increased NI and pension contributions.

Expenditure / Income Type	2022/2023 Budget (OR)	2022/2023 Budget (LA)	2024/25 Draft Budget (5% Vacancy Factor)	Increase/ Decrease on 2022/23 Revised
		£	£	
Employees	3,092,460	3,092,460	3,236,620	144,160
Premises Related Expenditure	42,310	42,310	43,580	1,270
Transport Related Expenditure	15,000	15,000	15,000	0
Supplies & Services	942,720	942,720	973,030	30,310
Central & Administrative Exp	31,200	31,200	31,200	0
<b>Total Expenditure</b>	<b>4,123,690</b>	<b>4,123,690</b>	<b>4,299,430</b>	<b>175,740</b>
Partner Contributions	-4,091,790	-4,091,790	-4,280,530	-188,740
Contributions from Other Bodies	-31,900	-31,900	-18,900	13,000
Contributions from Reserves	0	0	0	0
<b>Total Funding</b>	<b>-4,123,690</b>	<b>-4,123,690</b>	<b>-4,299,430</b>	<b>-175,740</b>



- 3.5 After allowing for a 5% vacancy factor, the budget for the Partnership budget will increase by £188,740, requiring increased funding from partners with a reduction from other bodies of £13,000 as per table 3 below.

### Partner Contributions

- 3.7 Partner contributions have been calculated based on the budget and split in accordance with the Partnership Agreement: The only exception to this split is:

- Search and liability expenses which are charged to each partner based on activity. Partners will be billed quarterly for actual costs incurred and will receive any recovered income directly into their own General Fund

Based on this methodology, the estimated contributions for each partner are detailed below for a budget with a vacancy factor at 5%. The impact of Covid is still placing pressure on the partnership, there it may mean savings might not be delivered as hoped.

Table 2	Total	Other Bodies	HBBC	HDC	NWLDC
			37.32%	28.87%	33.81%
Total Partnership Contributions excluding Searches and Liability Orders	4,250,930	0	1,586,450	1,227,240	1,437,240
Searches	8,700	0	2,070	1,660	4,970
Liability Order Expenses	20,900	0	7,450	7,290	6,160
<b>Total contribution from partners 2024/25 (A)</b>	<b>4,280,530</b>	<b>0</b>	<b>1,595,970</b>	<b>1,236,190</b>	<b>1,448,370</b>
Contributions from Other Bodies	18,900	18,900	0	0	0
Contribution from Reserves	0		0	0	0
<b>Total contribution 2024/25</b>	<b>4,299,430</b>	<b>18,900</b>	<b>1,595,970</b>	<b>1,236,190</b>	<b>1,448,370</b>
<b>Total contribution from partners 2023/24 (B)</b>	<b>-</b>		<b>-</b>	<b>-</b>	<b>-</b>
Contributions from Other Bodies	-31,900	-31,900	0	0	0
Total funding and contribution 2023/24	4,123,690	-31,900	1,525,530	1,181,700	1,384,560
<b>Difference – Increase/(Decrease) all contributions</b>	<b>175,740</b>	<b>-13,000</b>	<b>70,440</b>	<b>54,490</b>	<b>63,810</b>
<b>Actual Increase from Partner contribution in year (A)-(B)</b>	<b>188,740</b>	<b>0</b>	<b>70,440</b>	<b>54,490</b>	<b>63,810</b>

- 3.7.1 The change in contributions is mainly due to staff cost changes, see table 3 below.

<b>Table 3: Cost pressures</b>	<b>£</b>
Pay Award - 2024/25 - 4%	82,340
Increments	14,980
Additional costs of £1,925 pay award not budgeted for in 2023/24 - Replaced budget of 5% (inc Oncosts)	50,570
Other Minor variances	-3,730
<b>Total</b>	<b>144,160</b>
Loss of Income from Oadby & Wigston to cover cost of Shared Fraud Staff	13,000
Other Budget Variances Including Inflation	31,580
<b>Total increase</b>	<b>188,740</b>
Partner Contributions	-188,740

## Appendix 1 – Breakdown of budgets

Detail Code Name	2023/2024 Budget (OR)	2023/2024 Budget (LA)	2024/25 Draft Budget (5% Vacancy Factor)
Salaries - Full Time	3,080,510	3,080,510	3,224,610
Criminal Records Bureau Checks	850	850	880
Training Incl Conferences & Seminars	10,000	10,000	10,000
Professional Subscriptions	1,100	1,100	1,130
Rent	42,310	42,310	43,580
Mileage	15,000	15,000	15,000
Computer Software Maintenance & Upgrade	565,100	565,100	591,800
Computer Consumables	5,000	5,000	5,000
Flexible Working	33,350	33,350	28,350
Clothes & Uniforms	600	600	600
Printing & Stationery	16,940	16,940	11,940
Consultancy Fees	2,000	2,000	2,000
Audit Fees	7,290	7,290	7,510
Liability Order Expenses	20,900	20,900	20,900
Postages	17,090	17,090	17,940
Virtual Mail Room	242,390	242,390	254,510
Telephone	12,450	12,450	12,820
Mobile Telephone	1,660	1,660	1,710
Subsistence	500	500	500
Travel Arrangements	500	500	500
Subscriptions	7,250	7,250	7,250
Company Searches	8,700	8,700	8,700
Other - Miscellaneous	1,000	1,000	1,000
S151 Officer - Shared Services	12,000	12,000	12,000
Accountancy Support - Shared Services	6,000	6,000	6,000
Democratic Services - Shared Services	1,200	1,200	1,200
Monitoring Officer - Shared Services	12,000	12,000	12,000
<b>Total Costs</b>	<b>4,123,690</b>	<b>4,123,690</b>	<b>4,299,430</b>
Miscellaneous Income	-31,900	-31,900	-18,900
Contributions from Outside Bodies	-4,091,790	-4,091,790	-4,280,530
<b>Contributions and funding Total</b>	<b>-4,123,690</b>	<b>-4,123,690</b>	<b>-4,299,430</b>

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# Leicestershire Partnership Revenues & Benefits

## Financial Performance to November 2023

## 1. PURPOSE OF THE REPORT

- 1.1 To inform the Joint Committee of the financial performance of the Partnership for the period April 2023 to November 2023.

## 2. RECOMMENDATION

- 2.1 That the financial performance of the Partnership is noted.

## 3. INFORMATION

### Budget Position

- 3.1. The financial position of the Partnership is provided in **Appendix 1** to this report. The main headlines are given below for information.
- 3.2. As at 31 November 2023, the Partnership had a net overspend on the budget of £536,817, and on the actual position of £532,732. This gives an underlying net overspend of £4,085 as a variance to date. Note that income is profiled evenly throughout the year, while expenditure is profiled as and when expected. Therefore, at the year end, there is likely to be an overall underspend due to the vacancy position noted below.

	Budget to Nov 2023	Actual to Nov 2023	Variance to Nov 2023
INCOME	(£2,243,546)	(£2,061,807)	£181,739
EXPENDITURE	£2,780,363	£2,594,538	(£185,825)
Net Expenditure Over / (Under) Spend	£536,817	£532,732	(£4,085)

- 3.3 The key variances to the end of November 2023 to bring to the attention of the Joint Committee are:
- Salaries are underspend by £134,000 due to vacant posts now the 2023/24 pay award has been applied,
  - Postage savings of £20,000.
- 3.4 There is a potential for a significant year-end underspend on salaries of £205,000 if vacancies continue at the current rate.
- 3.5 The timing difference of £240,013 have been accrued for and are due to the invoices not being issued for payroll costs.
- 3.6 The salary costs for both North West Leicestershire and Harborough are based on estimates as this report was drafted before actuals had been provided, so the variance may change slightly when available.

## Appendix 1: Leicestershire Revenues & Benefits Partnership Monitoring Report to 30th November 2023

Expenditure / Income Type	2023/24 Latest Budget to Date	Actual to Date	Timing Differences	Variance after Timing Differences		2023/24 Total Estimate (Original)		2023/24 Total Estimate (Revised)
	£	£	£	£		£		£
Employees	2,064,602	1,688,270	238,177	138,155		3,092,460		3,092,460
Premises Related Expenditure	30,120	30,120		0		42,310		42,310
Transport Related Expenditure	10,000	2,598	0	7,402		15,000		15,000
Supplies & Services	660,041	617,937	1,836	40,268		942,720		942,720
Central & Administrative Exp	15,600	15,600		0		31,200		31,200
Revenue Income	-2,243,546	-2,061,807	0	-181,739		-4,123,690		-4,123,690
Use of Reserves to Cover Automation Costs				0		0		0
Sum:	536,817	292,719	240,013	4,085		0		0

### Timing Differences

	HDC	NWLDC	HBBC	Total
Salaries - October 2023	73,931	164,246		238,177
Mileage & Disturbance Costs - October 2023	0			0
Supplies & Services - October 2023	0	1,836		1,836
	<b>73,931</b>	<b>166,082</b>	<b>0</b>	<b>240,013</b>

<b><u>Explanations</u></b>	<b>Variance at 30/11/23(Over) / Under Spend £</b>	<b>Year End £</b>	<b>Explanation £5k+</b>
Salaries	134,000	205,000	This variance is due to a number of vacant posts for the 1st 8 months of the year and after allowing for the pay award which was higher than the original 5% budgeted for. The pay award was around £20k higher than budgeted for.
Other Minor Employee Related Costs	4,000		Variance > £5k
Car Allowances	7,000	5,000	Awaiting figures from Partners for October & November
Flexible working	5,000		Variance > £5k
Computer Consumables	3,000		Variance > £5k
Printing & Stationery	8,000		Printing costs lower than anticipated
Postages	10,000	18,000	Postage Costs less than anticipated
Liability Expenses	9,000		Court Costs lower than anticipated
Minor Variances	5,000		Other Minor Variances
Central & Administrative Exp	1,000		Variance > £5k
Contributions	-182,000		There is a direct link between partner contributions and expenditure incurred and therefore partner contributions have been adjusted to reflect the actual expenditure to date.
	<b>4,000</b>	<b>228,000</b>	





## **SERVICE PLAN 2023/24**

# **The Leicestershire Partnership Revenues and Benefits (LRBP)**

# **CONTENTS**

1. COUNCILS' AIMS AND PRIORITIES
2. OVERALL PURPOSE AND OBJECTIVES OF THE SERVICE
3. NATIONAL & LOCAL AGENDA ITEMS
4. KEY PROJECTS – OUR IMPROVEMENT PLAN
5. CUSTOMERS
6. PERFORMANCE
7. RISKS

## 1 Councils' Aims and Priorities:



- Priority 1
- Priority 2
- Priority 3
- Priority 4

### **Harborough District Council**

Place and Community: Community leadership to create a sense of pride and belonging  
Healthy Lives: Promoting health and wellbeing and encouraging healthy life choices  
Environment and sustainability: Creating a sustainable environment to protect future generations  
Economy: Supporting businesses and residents to deliver a prosperous local economy



Hinckley & Bosworth  
Borough Council

*A Borough to be proud of*

- Priority 1
- Priority 2
- Priority 3

### **Hinckley & Bosworth Borough Council**

People: Helping people to stay healthy, active, and protected from harm.  
Places: Creating clean and attractive places to live and work.  
Prosperity: Encouraging growth, attracting businesses improving skills and supporting regeneration.



- Priority 1
- Priority 2
- Priority 3
- Priority 4
- Priority 5

### **North West Leicestershire District Council**

Supporting Coalville to be a more vibrant, family town  
Our communities are safe, healthy, and connected  
Local people live in high quality, affordable homes  
Supporting businesses and helping people into local jobs  
Developing a clean and green district



<b>2. OVERALL PURPOSE AND OBJECTIVES OF THE SERVICE</b>	<b>To provide a high-quality Revenues and Benefits service to our residents and businesses at an economical cost and in accordance with the principles of continuous improvement and changing customer requirements.</b>
Objectives	<ol style="list-style-type: none"> <li>1) To assess and pay Housing Benefit and Council Tax Support accurately and promptly.</li> <li>2) As part of our DWP liaison role to ensure all referrals are made in accordance with the requirements of the DWP.</li> <li>3) To issue accurate and prompt Council Tax and NNDR bills to maximise collection rates, and to deal appropriately with non-payers to minimise arrears, whilst supporting those in need.</li> <li>4) To provide residents with a choice of how to engage with services via access channels that ensure customer choice, safety and are covid compliant</li> <li>5) To widely publicise the availability of business rate grants, discounts, exemptions, reliefs, and housing benefit, and to provide proactive advice on all Revenues and Benefits matters.</li> <li>6) To ensure that the service observes all statutory requirements including those governing the administration of Revenues and Benefits, Freedom of Information, Data Protection, Human Rights and Health and Safety.</li> <li>7) To adhere to our commitment to promote equality and diversity among our residents and staff.</li> <li>8) To provide and develop innovative services for all customers.</li> <li>9) To communicate effectively with our customers and stakeholders, developing our services to meet their changing needs.</li> <li>10) To provide accurate and timely services for our external and internal customers.</li> <li>11) To maximize collection rates whilst having due regard to the difficulties faced by some customers in making their payments. With reference to economic pressures presenting.</li> <li>12) Develop our services through well trained, empowered and committed staff who are proud to work for the Leicestershire Revenue and Benefits Service.</li> <li>13) To treat all our customers consistently and fairly.</li> <li>14) To learn from compliments, complaints and ensure service delivery reflects such feedback</li> <li>15) To provide Value for Money services by delivering both financial and processing efficiencies.</li> </ol>

Scope of services provided by the partnership	
Council Tax Billing, Recovery & Enforcement	Housing Benefit administration
NNDR Billing, Recovery & Enforcement (including BIDs for both HBBC and NWLDC)	Council Tax Reduction Scheme Administration (Council Tax Support)
The investigation of Council Tax Support Fraud	Housing Benefit Overpayment enforcement
Provision of customer support and guidance	Housing Benefit/Council Tax Support advice and support
DWP Liaison in respect of Housing Benefit Fraud	Administration of hardship awards and reliefs in any discipline
Certification & audit of grant claims for all disciplines	Ad hoc financial support to our communities via government schemes e.g., Test & Test Isolation Support payments, Energy Rebate payments, Covid-19 grants etc. Not a planned service but undertaken by LRBP.

### 3. National & Local Agenda Items

There are new and existing matters that will need to be addressed during the latter part of 2022 and 2023 to meet both central government objectives and the Partnerships.

The items are:

- 1 The financial impact on individuals and businesses arising from the Cost-of-Living crisis and unprecedented costs of energy
2. Continuation of the Housing Benefit Award Accuracy initiative
3. Reconciliation, post payment assurance and debt recovery linked to grants work
- 4 Energy Bills Support Scheme (EBSS)– Alternative Funding & Alternative Fuel payments (Domestic)
5. Business Rates revaluation effective 1 April 2023

6. Retail, Hospitality and Leisure Relief – Support for eligible retail, hospitality, and leisure businesses is increased from 50% to 75% business rates relief up to £110,000 per business in 2023-24.
7. Changes to service delivery brought about by unplanned changes beyond our control
8. Financial pressures on three constituent authorities, impacting on MTFS resulting in additional work streams linked to efficiencies and savings

### **Supporting communities**

It's likely several national measures will be introduced to support businesses and individuals because of the cost-of-living crisis, the Partnership will support other teams as required. This is a significant pressure on the partnership and becomes more of a pressure due to difficulties in recruiting to substantive roles and the cost of temporary staff.

### **The financial impact on individuals**

Central Government has announced a series of measures designed to support the most vulnerable in society. These include:

- Up-rating the state pension, benefits and the benefits cap in line with inflation (September CPI of 10.1%)
- Increasing the National Living Wage
- £650 one off Cost of Living Payment for those on means tested benefits and an anticipated payment of £900 in 2023-2024
- An additional one-off payment of £300 to pensioner households with a similar amount in 2023-2024
- Expanding the energy bills support scheme to reduce household bills by £400.

Whilst all these measures are welcomed it's highly likely that a significant number of households and businesses will struggle to pay their priority debts so we need to be mindful that this may well impact on our collection rates

### **Changes to Service Delivery**

Over the past year we have seen a number of initiatives that have been administered by the partnership. Most recently we were responsible for setting up, establishing eligibility and arranging payment of the energy rebate schemes (both main and discretionary). Against a backdrop of ensuring that our 'business as usual work' was maintained this incredibly complex and resource hungry project was delivered as required for all three LA's

#### 4 **KEY PROJECTS**

In addition to the 'business as usual' projects we are currently working on a number of new projects during 2023/24

Description	Key actions	Responsible Officer(s)	Critical Support
Embed the use of E-services to enable customers to self service	To include. E-Claim E-Change of circumstances Discount & Exemption module	Operational Managers	Academy/Systems/IT
Automation of benefit file transfers into LA systems (UCDS)	Testing to ensure that DWP data is updated as required and not compromised	Benefit Operational Manager	Academy/Systems
Compliance with GDPR and data removal/retention	Testing and removal of data	Head of Partnership	GDPR officer/Legal/systems
Business Process Re-engineering	Fully utilising the functionality provided by the Capita product	Benefit Operational Manager	Academy/Systems
Destin Solutions	Fully utilising the functionality provided by the MI and reporting tool	Operational Managers	PMT, Systems,LRBP Teamleaders
Promotion & marketing the partnership	As directed by Management Board & Joint Committee	Head of Partnership	Comms team /Legal/finance
Consideration of a single employer	Project Delivery as led by CEX	Head of Partnership	All partners
Working with potential new partner (s) to	As descriptor	Head of Partnership	MB, PMT,legal,HR,finance



onboard and put together business case			
Direct Debit Automation	Testing and automating elements of the direct Debit process	Operational Managers	Academy/Systems/IT
Exploring the use of Robotics within revenues and benefits	Establish whether it can deliver: Lower costs Increased speed of processing Increased accuracy	Head of Partnership	MB, PMT, Systems

## 5. **CUSTOMERS**

### **Service Standards**

- The Leicestershire Partnership aims to demonstrate its commitment to equality, diversity and fairness by:
  - Providing services which are accessible to all, and which meet customer needs. We do this by providing information in different languages, in large type or on tape or using British sign language where appropriate.
  - Promoting and demonstrating fairness and equality of opportunity in the employment of staff. This is achieved through a corporate approach to recruitment and staff retention that aims to be inclusive.
  - Being proactive in the promotion of equality and diversity with each council and all its operations.
  - Maintaining and improving turnaround times for new claims for Housing Benefit and Council Tax Support

## 6 **PERFORMANCE**

All targets will be reviewed following the 2022/23 out-turn. The setting of targets for the 2023/2024 financial year will be reported back to Joint Committee for approval

## 7 Risks

It is our intention to manage our business risks in a consistent and cost-effective manner.

Risk	Mitigating Actions in place	Actions put in place	Owner
Insufficient Business Continuity arrangements/plans: could prevent ability to deliver services	Business continuity plans in place Risk Assessment to prioritise resource against priority/critical services using generic corporate risk assessment	Like most LA's we are experiencing difficulties in recruiting to key positions within the Partnership. One of the key benefits that we can offer potential recruits is the ability to work flexibly (from home/office), however we may need to consider an enhanced pay package (budget allowing) to attract the right candidate. We have reviewed several processes that deliver the same outcome but do not require an actual visit or for staff to attend the office (i.e., making payments remotely)	Head of Partnership
Failure to keep up to date or not complying with latest legislation and regulations such as Health & Safety policy could lead to damage to reputation and potential prosecution	Implement revised requirements of new H&S Policy once approved by Council Attend training and adopt policy Enforcement of existing H&S policy and procedures	Each partner authority has their own policies which are reviewed and implemented as required	Operational Managers
Failure to improve sickness absence causes reduced capacity leading to failure/inability to deliver services/objectives efficiently	Continue to set absence targets and monitor against targets Compliance with Management of Absence arrangements Monthly monitoring of absence statistics provided by HR Setting of targets. Continued focus on long-term absence management and alternative options i.e., rehabilitation	The appropriate sickness absence monitoring framework is adhered to and reported monthly to the Management Board	Operational Managers

Reduced benefits subsidy from Central Govt. because of a high incidence of errors.	To introduce a revised Quality Checking Procedure within Benefits	Implementing the QA functionality within Destin to bring a consistent approach to QA within the partnership	Operational Managers
Effects of the cost of living crisis on collection and increase in Benefit Claims: need to deal with new claims and change of circumstance as quickly as possible to relieve financial hardship and avoid benefit overpayments	Regularly report on performance to Management Board.	As a result of the increasing cost of living we will continue to promote the availability of Council tax Support and discretionary discounts. Increased use of automation and electronic applications will reduce the time taken to process claims	Benefits Operational Manager
Failure to bring projects in on time	Effective Project management and forward planning of available resources	Adherence to project timetables	Head of Partnership
Partners do not involve LRBP in planning stage of projects, therefore meaning either BAU is compromised, or we are unable to support partners	All partners contribute to the LRBP service plan effectively	Following repeated incidents, all asked to contribute to the service plan, direct requests for resource via HoP	LRBP Management Board
Capita's failure to deliver critical software releases on time potentially impacting on key projects/completion of statutory returns etc	Effective management of the escalation protocols within Capita and project management of our resources	Adherence to project timetables and maintain effective lines of communication with our account manager	Head of Partnership
Inability to recruit to roles or authorisation not given to recruit to vacant roles	Robust business case provided to recruit to full time roles as appropriate.	Liaison with Comms and HR to attract candidates and advertise in the correct place. Whilst noting there are problems in all service areas with recruitment	ALL

## How?

- Maintain a robust and consistent risk management approach that will identify and effectively manage strategic, operational, partnership and project risks
- Ensure accountabilities, roles and responsibilities for managing risks are clearly defined and communicated
- Consider risk as an integral part of service improvement planning, key decision-making processes, and project and partnership governance
- Communicate risk information effectively through a clear reporting framework
- Increase understanding and expertise in risk management through targeted training and the sharing of best practice.



PAPER

# Revenue and Benefit Service

## Performance Report November 2023

## Caseload Analysis

Banded Council Tax Dwellings											Current Position	In Year Movement	In Year Percentage Movement
HBBC	50,359	453	50,601	242	50,852	251	51,232	380	51,764	532	52,196	432	1.9%
HDC	39,739	650	40,532	793	41,554	1,022	42,590	1,036	43,528	938	44,183	655	3.7%
NWLDC	44,940	733	45,564	624	46,277	713	47,189	912	48,028	839	48,408	380	2.6%
Totals	135,038		136,697		138,683			Current Total:	143,320	4,637	144,787		
NDR Rated Assessments									Position		Current Position	In Year Movement	In Year Percentage
HBBC	3,181	19	3,179	-2	3,224	45	3,262	38	3,298	36	3,329	31	2.05%
HDC	3,086	46	3,123	37	3,189	66	3,246	57	3,277	31	3,279	2	1.02%
NWLDC	3,440	23	3,519	79	3,563	44	3,554	-9	3,589	35	3,589	0	0.98%
Totals	9,707		9,821		9,976			Current Total:	10,164	188	10,197		
HB/CTLS Live Caseload									Caseload		Current Caseload	In Year Movement	Caseload %
HBBC	5,579	-204	5,321	-258	5,257	-64	5,257	-260	5,249		5,196	-53	
					Current Caseload Analysis	Joint HB/CTS			1,892	1,836	1,770	-66	34%
						HB only			301	300	304	4	6%
						CTS only			3,019	3,113	3,122	9	60%
HDC	3,243	-145	3,185	-58	3,210	25	3,210	-198	3,076		3,135	59	
					Current Caseload Analysis	Joint HB/CTS			1,322	1,233	1,244	11	40%
						HB only			196	173	179	6	5%
						CTS only			1,692	1,670	1,712	42	55%
NWLDC	5,413	-283	5,118	-295	4,964	-154	4,964	-312	4,972		4,945	-27	
					Current Caseload Analysis	Joint HB/CTS			2,100	2,069	2,005	-64	41%
						HB only			206	197	195	-2	4%
						CTS only			2,655	2,706	2,745	39	55%
Totals	14,235		27,248			Current Total:			13,297		13,276		

## Leicestershire Partnership - Revenues and Benefits Performance Indicators

Harborough District Council													2023/24	Year - End 2023/24 target
BENEFITS	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Cumulative	
In month: New Claims (Days)	22.1	21.8	18.5	16.5	16.2	14.5	15.3	15.8					17.6	15
Position for 2022/23	14.7	13.9	16.1	15.5	11.9	17.1	20.5	18.9	13.5	24.2	15	19.1	16.7	
In month: Change Events (Days)	7.2	8.6	5.2	3.9	5.7	5.8	5.4	5.1					5.8	6
Position for 2022/23	5.5	6.5	8.1	5.5	4.2	8.1	8.3	7.5	5.7	7.7	2.5	6	6.3	
COUNCIL TAX	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In Year (%)	10.6%	19.7%	28.9%	38.0%	47.1%	56.2%	65.5%	74.5%					74.5%	98.1%
This years profiled target (based on 22/23)	10.8%	20.0%	29.2%	38.2%	47.2%	56.4%	65.7%	74.9%	83.7%	92.8%	95.9%	98.3%	98.3%	
Arrears Reduction (£m) end of month	£3.5m	£3.4m	£3.3m	£3.3m	£3.3m	£3.3m	£3.3m	£3.3m					£3.3m	INFO
Position for 2022/23	£3.2m	£3.1m	£3.0m	£2.9m	£2.8m	£2.7m	£2.7m	£2.6m	£2.6m	£2.4m	£2.3m	£2.2m	£2.2m	
NON DOMESTIC RATES	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In Year (%)	7.9%	15.9%	25.6%	35.4%	44.1%	53.1%	61.7%	70.8%					70.8%	99.2%
This years profiled target (based on 22/23)	9.5%	18.5%	28.4%	37.7%	47.2%	56.6%	64.7%	73.5%	78.3%	85.0%	88.1%	98.6%	98.6%	
Arrears Reduction (£m) end of month	£2.1m	£1.7m	£1.5m	£1.7m	£1.9m	£1.3m	£0.75m	£0.53m					£0.53m	INFO
Position for 2022/23	£1.4m	£0.71m	£0.69m	£0.68m	£0.59m	£0.57m	£0.83m	£0.81m	£1.7m	£2.2m	£2.1m	£0.79m	£0.79m	
HOUSING BENEFIT DEBT	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
HB Overpayments outstanding	£0.75m	£0.77m	£0.75m	£0.75m	£0.76m	£0.76m	£0.77m	£0.78m					£0.78m	INFO
Position for 2022/23 (£m)	£0.75m	£0.75m	£0.75m	£0.76m	£0.74m	£0.74m	£0.73m	£0.74m	£0.74m	£0.74m	£0.75m	0.75m	£0.75m	
HB Overpayments Recovered end of month	2%	3%	5%	5%	6%	7%	8%	9%					9%	31%
This year sprofiled target (based on 22/23)	1%	3%	4%	6%	10%	11%	12%	13%	13%	14%	14%	15%	15%	
FRAUD	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
CTLS Sanctions gained	0	0	2	0	2	0	0	0					4	6
This years profiled target	0	0	2	1	0	0	0	0	0	1	0	0	4	

North West Leicestershire District Council													2023/24	Year End 2023/24 target
BENEFITS	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In month: New Claims (Days)	24.3	24.6	19.7	15.7	15.6	14.9	15.8	19.1*					18.7	15
Position for 2022/23	15.4	13.9	17.2	15.2	12.6	20.4	21.2	18.8	20.2	24	15.3	18.8	17.8	
In month: Change Events (Days)	6.9	8	5	4.6	4.9	5.3	5.7	5.5					5.7	6
Position for 2022/23	5.8	6.2	8.3	5.1	4.5	7.1	7.0	8.0	6.5	7.8	2	7.9	6.3	
COUNCIL TAX	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In Year (%)	9.9%	18.9%	28.0%	37.0%	46.1%	55.1%	64.2%	73.3%					73.3%	97.3%
This years profiled target (based on 22/23)	10.0%	19.1%	28.1%	37.1%	46.1%	55.1%	64.2%	73.4%	82.3%	91.4%	94.5%	97.2%	97.2%	
Arrears Reduction (£m) end of month	£6.5m	£6.4m	£6.2m	£6.2m	£6.2m	£6.2m	£6.2m	£6.2m					£6.2m	INFO
Position for 2022/23	£6.2m	£5.6m	£5.5m	£5.3m	£5.2m	£5.1m	£5.0m	£4.9m	£4.9m	£4.7m	£4.4m	£5.0m	£5.0m	
NON DOMESTIC RATES	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In Year (%)	9.2%	18.0%	26.8%	37.0%	45.7%	54.9%	62.1%	70.2%					70.2%	99.0%
This years profiled target (based on 22/23)	10.0%	18.5%	28.1%	37.9%	46.2%	55.4%	64.4%	73.5%	82.3%	91.3%	95.6%	99.1%	99.1%	
Arrears Reduction (£m) end of month	£1.6m	£1.5m	£2.1m	£1.5m	£0.5m	£0.5m	£0.76m	0.87m					£0.87m	INFO
Position for 2022/23	£1.7m	£1.1m	£1.2m	£1.1m	£1.0m	£0.98m	£0.85m	£0.85m	£0.71m	£0.58m	£0.42m	£0.51m	£0.51m	
HOUSING BENEFIT DEBT	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
HB Overpayments outstanding end of month	£1.3m	£1.3m	£1.3m	£1.3m	£1.3m	£1.3m	£1.3m	£1.3m					£1.3m	INFO
Position for 2022/23 (£m)	£1.2m	£1.2m	£1.2m	£1.2m	£1.2m	£1.2m	£1.2m	£1.2m	£1.2m	£1.2m	£1.3m	£1.3m	£1.3m	
HB Overpayments Recovered	1%	3%	4%	5%	7%	8%	9%	10%					10%	34%
This years profiled target (based on 22/23)	5%	10%	11%	14%	14%	16%	17%	18%	19%	20%	21%	21%	21%	
FRAUD	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
CTLS Sanctions gained	0	0	1	1	0	0	1	0					3	6
This years profiled target (Based on 22/23)	0	0	1	0	1	0	2	0	0	0	0	0	4	



Hinckley & Bosworth Borough Council													Cumulative 2023/24	Year-End 2023/24 Target
BENEFITS	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In month: New Claims (Days)	21.7	21.8	16.7	15.6	16.8	14.2	16.9	13.9					17.2	15
Position for 2022/23	15.4	14.8	14.8	14.0	12.3	18.9	18.9	20.1	17.3	22.8	15.2	16.5	16.7	
In month: Change Events (Days)	8.2	8.1	5	4.5	5.2	4.7	5	4.8					5.7	6
Position for 2022/23	5.4	6.1	7.9	5.4	4.8	7.4	7.3	7.2	5.0	8.5	2.2	7.2	6.2	
COUNCIL TAX	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In Year (%)	10.4%	19.5%	28.6%	37.6%	46.7%	55.9%	65.1%	74.3%					74.3%	97.6%
This years profiled target (based on 22/23)	10.6%	19.7%	28.8%	37.8%	47.0%	56.2%	65.5%	74.6%	83.5%	92.60%	95.40%	97.70%	97.7%	
In Year Arrears Reduction (£) end of month	£5.5m	£5.3m	£5.3m	£5.3m	£5.3m	£5.3m	£5.3m	£5.3m					£5.3m	INFO
Position for 2022/23	£5.2m	£5.0m	£4.9m	£4.7m	£4.5m	£4.5m	£4.4m	£4.4m	£4.3m	£4.3m	£4.1m	£4.1m	£4.1m	
NON DOMESTIC RATES	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In Year (%)	10.5%	20.2%	29.1%	39.4%	48.6%	57.0%	66.3%	75.0%					75.0%	98.8%
This years profiled target (based on 22/23)	10.4%	18.9%	26.2%	37.1%	46.0%	55.8%	64.5%	75.1%	83.7%	92.3%	95.1%	98.1%	98.1%	
Arrears Reduction (£m) end of month	£1.2m	£1.2m	£1.2m	£1.2m	£1.5m	£1.4m	£1.4m	£1.4m					£1.4m	INFO
Position for 2022/23	£1.3m	£1.3m	£2.3m	£2.2m	£1.4m	£1.3m	£0.72m	£0.67m	£0.63m	£0.62m	£0.56m	£0.55m	£0.55m	
HOUSING BENEFIT DEBT	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
HB Overpayments outstanding end of month	£1.1m	£1.1m	£1.1m	£1.1m	£1.1m	£1.1m	£1.0m	£1.0m					£1.0m	INFO
Position for 2022/23 £m	£1.1m	£1.1m	£1.1m	£1.1m	£1.1m	£1.1m	£1.1m	£1.1m	£1.1m	£1.1m	£1.1m	£1.1m		
HB Overpayments Recovered	1%	4%	6%	7%	9%	11%	15%	16%					16%	36%
This years profiled target (based on 22/23)	2%	4%	5%	6%	7%	8%	11%	12%	13%	14%	14%	15%		
FRAUD	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
CTLS Sanctions gained	0	0	0	0	0	1	0	0					1	6
This years profiled target (based on 22/23)	2	0	0	0	1	2	0	1	0	1	0	2	9	

### DWP Housing Benefit Subsidy impact – ‘Local Authority Error/ Time Delay’

HBBC	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March
Lower Threshold	£4,379	£10,586	£15,264	£19,445	£23,699	£28,334	£32,839	£37,492				
Upper Threshold	£4,926	£11,910	£17,172	£21,876	£26,662	£31,876	£36,944	£42,179				
<b>Actual</b>	<b>£547</b>	<b>£2,501</b>	<b>£6,861</b>	<b>£9,492</b>	<b>£9,917</b>	<b>£12,485</b>	<b>£12,682</b>	<b>£13,093</b>				
Lower Tolerance	£3,831	£8,085	£8,403	£9,954	£13,783	£15,849	£20,157	£24,399	£0	£0	£0	£0
Upper Tolerance	£4,379	£9,408	£10,311	£12,384	£16,745	£19,391	£24,261	£29,085	£0	£0	£0	£0

HDC	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March
Lower Threshold	£2,716	£7,700	£10,579	£13,451	£16,516	£19,412	£22,187	£25,350				
Upper Threshold	£3,056	£8,663	£11,902	£15,132	£18,581	£21,838	£24,960	£28,518				
<b>Actual</b>	<b>£25</b>	<b>£119</b>	<b>£716</b>	<b>£769</b>	<b>£917</b>	<b>£1,583</b>	<b>£1,699</b>	<b>£1,698</b>				
Lower Tolerance	£2,691	£7,581	£9,863	£12,681	£15,599	£17,829	£20,488	£23,652	£0	£0	£0	£0
Upper Tolerance	£3,031	£8,544	£11,185	£14,363	£17,664	£20,255	£23,261	£26,820	£0	£0	£0	£0

NWLDC	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March

Lower Threshold	£4,400	£8,470	£15,015	£19,049	£23,044	£27,514	£31,537	£35,988				
Upper threshold	£4,950	£9,528	£16,892	£21,430	£25,925	£30,953	£35,480	£40,487				
<b>Actual</b>	<b>£9,454</b>	<b>£2,632</b>	<b>£3,123</b>	<b>£3,576</b>	<b>£747</b>	<b>£1,473</b>	<b>£1,781</b>	<b>£1,968</b>				
Lower Tolerance	-£5,054	£5,838	£11,892	£15,473	£22,297	£26,041	£29,757	£34,021	£0	£0	£0	£0
Upper Tolerance	-£4,504	£6,897	£13,769	£17,854	£25,178	£29,480	£33,699	£38,519	£0	£0	£0	£0

### Benefits Operational Team (Housing Benefit, Council Tax Support and Fraud)

#### Speed of Processing

All 3 LA's are meeting the target for processing changes in circumstances despite encountering software issues, and we are making marginal progress in improving the processing times for new claims.

\* Processing time for North West Leicestershire was impacted in November when around 80 customer emails were identified that had not been passed through to Revenues and Benefits. These are currently being worked through to ensure that all customers receive their full entitlement.

#### LA Error and Subsidy

There has been no negative impact on subsidy as all LA's are below the lower threshold for LA error.

#### Discretionary Housing Payments (DHP's)

We have seen a significant year on year reduction in the Government funding for DHP's but unfortunately there has not been a commensurate reduction in demand which has grown expeditiously.

Latterly we have noticed that there has also been an increase in claims from those who have previously not claimed but

have been hit with increases in their rent as a result of landlords facing an increase in their mortgages due to the increases in interest rates. The weekly awards have also been increasing and have examples where the shortfall between the rent and benefit entitlement exceeds £100 per week.

Additional funding has been provided based on previous years spend but taking into account future commitments for the next four months a significant supplementary budget will be required.

\*A separate briefing note will be supplied shortly forecasting future spend (based on current) and the various options available which could include limiting the weekly award.

The position at the end of November is as follows:

LA	Funding	Spend to 30/11 (excludes advance payments)	Claims from those in receipt of HB	Claims from those in receipt of UC
HBBC	£78,739	£105,745	£21,273	£84,472
NWLDC	£81,022	£89,704	£25,992	£63,712
HDC	£51,889	£36,399	£3,153	£33,246

You will note that those entitled to Universal Credit comprise the largest proportion of claimants.

## Revenues Operational Team

### (Council Tax, Non-Domestic Rates and Housing Benefit Overpayments)

#### Council Tax collection

Collection is slightly behind the profiled target of between 0.1 and 0.4%.

#### Business Rate collection

Increases in the debit continues to affect collection for both HDC and NWLDC, with NWLDC seeing an increase in rates payable of £1.96m over the previous month.

## FORWARD PLAN FOR JOINT COMMITTEE 2023-24

Decision	Date of Decision (approx.)	Contacts
Budget Setting Report	January 2024	Ashley Wilson – Section 151 Officer
Financial Performance Report	January 2024	Ashley Wilson – Section 151 Officer
Service Plan 2023/24	January 2024	Sally O’Hanlon – Head of Partnership
Performance Report	January 2024	Sally O’Hanlon – Head of Partnership
Financial Performance Report	March 2024	Ashley Wilson – Section 151 Officer
Performance Report	March 2024	Sally O’Hanlon – Head of Partnership
Internal Audit Report	March 2024	Sally O’Hanlon – Head of Partnership
Future of the Partnership (Confidential Item)	March 2024	Sally O’Hanlon – Head of Partnership
Schedule of meetings	June 2024	Democratic Services
Year End Performance Report	June 2024	Sally O’Hanlon – Head of Partnership
Year End Financial Report	June 2024	Ashley Wilson – Section 151 Officer
Future of the Partnership (Confidential Item)	June 2024	Sally O’Hanlon – Head of Partnership
<b>Annual Meeting</b>		
Audit Review Plan	September 2024	Ashley Wilson – Section 151 Officer
Financial Performance Report	September 2024	Ashley Wilson – Section 151 Officer
Performance Report	September 2024	Sally O’Hanlon – Head of Partnership
Future of the Partnership (Confidential Item)	September 2024	Sally O’Hanlon – Head of Partnership
Financial Performance Report	November 2023	Ashley Wilson – Section 151 Officer

Decision	Date of Decision (approx.)	Contacts
Performance Report	November 2023	Sally O’Hanlon – Head of Partnership
Future of the Partnership (Confidential Item)	November 2023	Sally O’Hanlon – Head of Partnership