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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, 25 JULY 2024

Location

Council Chamber - Harborough District Council

Officer to contact

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Tel: 01455 255834

Councillor P Beadle
Councillor S Bray
Councillor M Graves

Councillor K Lynch
Councillor A Woodman
Councillor M Wyatt

Recording of meetings

All persons present are reminded that the meeting may be recorded and by attending this meeting you are giving your consent to being filmed and your image being used. You are kindly requested to make it known to the Chairman if you intend to film or record this meeting.

We also allow the use of social media during meetings, which helps to bring the issues discussed to a wider audience.

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Thank you

**LEICESTERSHIRE PARTNERSHIP REVENUES & BENEFITS JOINT COMMITTEE -
25 JULY 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 previous meeting.

4. YEAR END PERFORMANCE REPORT MARCH 2024 (Pages 3 - 12)

To present the performance information for 2023/24

5. PROVISIONAL FINANCIAL PERFORMANCE TO MARCH 2024 (Pages 13 - 18)

To inform members of the provisional year end position on financial performance of the Partnership for the period April 2023 to March 2024

6. SCHEDULE OF MEETINGS FOR 2024/25 (Pages 19 - 22)

To provide members with a schedule of meetings for 2024/25

7. FORWARD PLAN (Pages 23 - 24)

To note the joint committee's forward plan.

8. 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

21 MARCH 2024 AT 3.30 PM

PRESENT: Cllr Wyatt - Chair
Cllr KWP Lynch – Vice-Chair
Cllr SL Bray and Cllr Graves

Also in attendance:

Officers in attendance: Carolyn Bland, Julie Kenny, Paul Stone, Rebecca Valentine-Wilkinson and Ashley Wilson

77. **Apologies for absence**

Apologies were received from Councillor Beadle and Councillor Woodman.

78. **Declarations of interest**

There were no interests declared at this meeting.

79. **Minutes of previous meeting**

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

RESOLVED – the minutes of the meeting held on 18 January 2024 be confirmed as a correct record.

80. **Performance Report**

Members were presented with the performance report up to January 2024.

Members noted the report.

81. **Financial Performance**

Members were presented with the financial performance of the Partnership for the period April 2023 to January 2024.

In response to questions from members, around the planned budget underspend of 32k this year, it was confirmed that:

- There was a potential for a significant year-end underspend on salaries and postage based on current estimates.
- Historically HBBC invoiced the other two authorities for their contributions each year and there were no other forward payments.
- By working in this way there was a small benefit to the two other partners but in the spirit of partnership working HBBC continued to work in this way.

Members noted the report.

82. **Forward Plan**

Members noted the forward plan.

83. **Dates of future meetings**

Members noted the future meeting dates.

(The Meeting closed at 3.40 pm)

CHAIR



PAPER

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Revenue and Benefit Service

Performance Report
March 2024

Agenda Item 4

1. PURPOSE OF THE REPORT

1.1. To inform members of the performance of the Partnership for the period April 2023 to March 2024.

2. RECOMMENDATION

2.1. That performance is noted and used to determine the targets for 2024/2025.

2.2. The targets are set as detailed below

Caseload Analysis

Position at:	Position at 31/3/19	2018/19 In Year Movement	Position at 31/3/20	2019/20 In Year Movement	Position at 31/3/21	2020/21 In Year Movement	Position at 31/3/22	2021/22 In Year Movement	Position at 31/3/23	2022/23 In Year Movement	2023/24			
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	52,305	541	2.1%	
HDC	39,739	650	40,532	793	41,554	1,022	42,590	1,036	43,528	938	44,398	870	4.2%	
NWLDC	44,940	733	45,564	624	46,277	713	47,189	912	48,028	839	48,554	526	2.9%	
Totals	135,038		136,697		138,683			Current Total:	143,320	4,637	148,386			
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	3,337	39	2.30%	
Debit (£)									(previous month)	40,741,035	40,661,235			
HDC	3,086	46	3,123	37	3,189	66	3,246	57	3,277	31	3,296	19	1.54%	
Debit (£)									(previous month)	62,077,002	62,009,388			
NWLDC	3,440	23	3,519	79	3,563	44	3,554	-9	3,589	35	3,516	-73	-1.07%	
Debit (£)									(previous month)	99,361,728	99,241,444			
Totals	9,707		9,821		9,976			Current Total:	10,164	188	10,149			
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		5,202	-47		
					Current Caseload Analysis	Joint HB/CTS	1,892	1,836			1,735	-101	33%	
						HB only	301	300			309	9	6%	
						CTS only	3,019	3,113			3,158	45	61%	
HDC	3,243	-145	3,185	-58	3,210	25	3,210	-198	3,076		3,129	53		
					Current Caseload Analysis	Joint HB/CTS	1,322	1,233			1,205	-28	39%	
						HB only	196	173			168	-5	5%	
						CTS only	1,692	1,670			1,756	86	56%	
NWLDC	5,413	-283	5,118	-295	4,964	-154	4,964	-312	4,972		4,934	-38		
					Current Caseload Analysis	Joint HB/CTS	2,100	2,069			1,944	-125	39%	
						HB only	206	197			188	-9	4%	
						CTS only	2,655	2,706			2,802	96	57%	
Totals	14,235		27,248			Current Total:			13,297		13,265			

Leicestershire Partnership - Revenues and Benefits Performance Indicators

North West Leicestershire District 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)	24.3	24.6	19.7	15.7	15.6	14.9	15.8	19.1	17.7	17.5	13.9	14.6	17.8	15
<i>Position for 2022/23</i>	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	5.4	6.5	2.2	5	5.4	6
<i>Position for 2022/23</i>	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%	82.2%	91.3%	94.3%	97.2%	97.2%	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	£6.0m	£5.9m	£5.8m	£5.6m	£5.5m	£5.4m	£5.4m	£5.3m	£5.2m	£5.1m	£4.8m	£4.8m	£4.8m	INFO
<i>Position for 2022/23</i>	£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%	78.5%	89.2%	92.5%	97.2%	97.2%	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	£0.8m	£0.9m	£2.3m	£2.1m	£0.18m	£0.28m	£0.28m	INFO
<i>Position for 2022/23</i>	£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	£1.3m	£1.3m	£1.3m	£1.3m	INFO
<i>Position for 2022/23 (£m)</i>	£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%	11%	11%	13%	13%	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	0	0	0	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	12.9	16.2	13.9	13.8	16.2	15
<i>Position for 2022/23</i>	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	3.8	7	2.1	3.7	5.2	6
<i>Position for 2022/23</i>	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%	83.1%	92.2%	94.9%	97.5%	97.5%	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	£5.1m	£5.0m	£4.9m	£4.8m	£4.8m	£4.7m	£4.6m	£4.5m	£4.5m	£4.4m	£4.2m	£4.2m	£4.2m	INFO
<i>Position for 2022/23</i>	£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%	83.3%	92.7%	95.6%	98.5%	98.5%	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	£1.3m	£1.2m	£1.0m	£1.0m	INFO
<i>Position for 2022/23</i>	£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	£1.0m	£1.0m	£1.0	£1.0m	INFO
<i>Position for 2022/23 £m</i>	£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%	17%	19%	20%	21%	21%	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	2	1	0	0	4	6
This years profiled target (Based on 22/23)	2	0	0	0	1	2	0	1	0	1	0	2	9	

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	13.4	19.1	16.1	15.2	17.0	15
<i>Position for 2022/23</i>	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	4.6	6.6	2.1	4.1	5.4	6
<i>Position for 2022/23</i>	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%	83.5%	92.5%	95.3%	98.0%	98.0%	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	£3.1m	£3.0m	£2.9m	£2.8m	£2.7m	£2.6m	£2.6m	£2.6m	£2.5m	£2.5m	£2.5m	£2.4m	£2.4m	INFO
<i>Position for 2022/23</i>	£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%	80.3%	89.4%	94.9%	98.7%	98.7%	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	£0.5m	£0.5m	£0.4m	£0.6m	£0.4m	£0.4m	INFO
<i>Position for 2022/23</i>	£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	£0.77m	£0.77m	£0.78m	£0.78m	£0.78m	£.078m	INFO
<i>Position for 2022/23 (£m)</i>	£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%	10%	11%	12%	14%	14%	31%
This year profiled 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	1	1	3	0	9	6
This years profiled target (based on 22/3)	0	0	2	1	0	0	0	0	0	1	0	0	4	

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	£41,625	£45,968	£50,206	£54,356
Upper Threshold	£4,926	£11,910	£17,172	£21,876	£26,662	£31,876	£36,944	£42,179	£46,828	£51,714	£56,481	£61,150
Actual	£547	£2,501	£6,861	£9,492	£9,917	£12,485	£12,682	£13,093	£18,521	£18,944	£19,233	£20,468
Lower Tolerance	£3,831	£8,085	£8,403	£9,954	£13,783	£15,849	£20,157	£24,399	£23,104	£27,024	£30,973	£33,887
Upper Tolerance	£4,379	£9,408	£10,311	£12,384	£16,745	£19,391	£24,261	£29,085	£28,307	£32,770	£37,249	£40,682

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	£28,207	£31,179	£33,960	£36,764
Upper Threshold	£3,056	£8,663	£11,902	£15,132	£18,581	£21,838	£24,960	£28,518	£31,733	£35,076	£38,205	£41,359
Actual	£25	£119	£716	£769	£917	£1,583	£1,699	£1,698	£1,852	£2,802	£2,802	£4,316
Lower Tolerance	£2,691	£7,581	£9,863	£12,681	£15,599	£17,829	£20,488	£23,652	£26,355	£28,377	£31,158	£32,447
Upper Tolerance	£3,031	£8,544	£11,185	£14,363	£17,664	£20,255	£23,261	£26,820	£29,881	£32,274	£35,403	£37,043

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	£39,027	£42,849	£46,776	£50,593
Upper threshold	£4,950	£9,528	£16,892	£21,430	£25,925	£30,953	£35,480	£40,487	£43,906	£48,205	£52,623	£56,918
Actual	£9,454	£2,632	£3,123	£3,576	£747	£1,473	£1,781	£1,968	£2,190	£3,217	£3,560	£8,508
Lower Tolerance	-£5,054	£5,838	£11,892	£15,473	£22,297	£26,041	£29,757	£34,021	£36,838	£39,632	£43,217	£42,085

Upper Tolerance	-£4,504	£6,897	£13,769	£17,854	£25,178	£29,480	£33,699	£38,519	£41,716	£44,988	£49,064	£48,409
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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 and despite our best efforts we have not been able to claw back the processing time lost during April 2023. To recap Vodafone disconnected the PSN circuit we use to gain real time access to DWP and HMRC data which meant that if we needed to verify a claimant details, we had to contact them direct. The link was not restored until 3 May 2023 which meant we did not have this functionality for over 30 days. In addition to this, we continue to have difficulties recruiting experienced staff for vacant roles.

LA Error and Subsidy

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

Universal Credit Managed Migration

A separate briefing has been prepared setting out the DWP's plans but 'Shelter' have already raised concerns that because of the significant differences between housing benefit and universal credit, there will be claimants who struggle to make a new claim on time. They have asked the DWP to pause the rollout to people who only claim housing benefit and make sure there are adequate safeguards in place to identify and support people who may find the move to UC difficult.

Housing Support Fund & Debt Relief Orders

To help the most vulnerable households with the cost of essentials such as food and utilities, the government is providing an additional £500 million to enable the extension of the Household Support Fund in England from April to September 2024. The fund was supposed to end on 31 March 2024 but pressure from Councils has seen this extension.

To support households struggling with problem debts, the government is making it easier to access a debt relief order (DRO). DROs are a personal insolvency debt solution for individuals who cannot pay their debts. At Spring Budget, the government is removing the £90 administration fee from 6 April 2024. The government is also raising the maximum debt value threshold from £30,000 to £50,000 and increasing the maximum value of motor vehicle that an individual can retain from £2,000 to £4,000, from 28 June 2024.

Revenues Operational Team (Council Tax, Non-Domestic Rates and Housing Benefit Overpayments)

Council Tax collection

All three LAs are only 0.1% behind the profiled target at year end, in monetary terms this amounts to approximately £70k. NWLDC maintains the same level of collection as last year.

At the IRRV virtual conference it was highlighted that Council Tax collection remains very difficult nationwide.

Business Rate collection

All three LA's have not met the profiled target. In monetary terms HDC required a further £300k; HBBC £130k and NWLDC £1.8m to hit target.

As previously highlighted, both HDC and HBBC have seen significant increases in their respective debits throughout the financial year. HDC had £1.2m and HBBC £509k in new assessments in the final 6 months of the year, reducing the time available for repayment and collection. At NWLDC one assessment valued at £2.15m remained uncollected due to delays from the Government in issuing Freeport relief guidance. This equates to 2.16% of their net collectible debit. Without this assessment the target would have been exceeded.

We have faced a number of challenges this year in relation to collection which includes the cost-of-living crisis affecting both businesses and households and to a lesser extent changes in finance systems at NWLDC & HDC which has created difficulties in cash allocation in some cases.

Business Rates recovery

Prior years' recovery continues in Business Rates. Comparison against the position last year is unreliable due to the nature of the business rates system, where changes to the rating list can be backdated for several years, impacting on the arrears levels.

Select Committee report on council tax collection.

The Government has responded to the Levelling Up, Housing and Communities Select Committee report on collection setting out their views and amongst other areas have confirmed that:

- There are no plans to remove imprisonment as a sanction for non-payment. "The payment of council tax is critical to the delivery of local services to the local community and the ultimate risk of imprisonment for willful non-payment

is a tool that can assist councils in getting residents to engage and to assist councils in council tax collection.”

- The government has no plans to conduct a revaluation of council tax bands. “A revaluation would be expensive to undertake, and it would particularly risk penalising those on a lower income, including pensioners, who have seen their homes appreciate in value, and might face a substantial increase in tax without having the income to pay it. It may also increase council tax for households where home improvements have been made since they moved in”.

Key Performance Indicators 2024/2025

It is normal process to wait for outturn before setting targets. The above information will assist in target setting, the targets are recommended as below.

	Ave Outturn 2022/23	Ave Outturn 2023/24	Target 2022/3 & 2023/4	Suggested 2024/25
New Claims	17	17	15	15 days (this is an ambitious target, though needs to be ambitious to make payments to our residents in a timely manner during the cost-of-living crisis)
Change of Circumstances	5.3	5.3	6	6 days (remain the same)
NDR	NWLDC 23/4 Target 99.0% Outturn 97.2%	HBBC 23/24 Target 98.8% Outturn 98.5%	HDC 23/4 Target 99.2 % Outturn 98.7%	All three LAs remain the same, (noting a % may not be the best measure)
Council Tax	23/4 Target 97.3 Outturn 97.2 %	23/4 Target 97.6% Outturn 97.5%	23/4 Target 98.1% Outturn 98.0%	Reduction of 0.1% to all three authorities; in recognition of ongoing cost of living pressures/collection pressures felt nationwide.

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Leicestershire Partnership Revenues & Benefits

Provisional Financial Performance to March 2024

Joint Committee

1. PURPOSE OF THE REPORT

- 1.1 To inform the Joint Committee of the provisional year end position on financial performance of the Partnership for the period April 2023 to March 2024.

2. RECOMMENDATION

- 2.1 That the financial performance of the Partnership is noted.
- 2.2 That members of the Joint Committee approve the savings in year are added to the ICT earmarked reserves while work is done to finalise ICT costs and pressures.

3. INFORMATION

Budget Position

- 3.1. The provisional financial position of the Partnership has been outlined in **Appendix 1** to this report. The key headlines are detailed below for information.
- 3.2. As at 31 March 2024, the Partnership had a provisional overall net underspend of £199,199 with expenditure being underspend by £205,883 and an income variance of £0. Note that income is profiled evenly throughout the year, while expenditure is profiled as and when expected.

Table 1 31 March 2024	Income	Expenditure	Net Expenditure Over / (Under) Spend
Budget to Date	(£4,123,690)	£4,123,690	£0
Actual to Date	(£4,117,006)	£3,917,807	(£199,199)
Variance	(£6,684)	£205,883	£199,199

- 3.3 The key variances to the end of March 2024 to bring to the attention of the Management Board are:
- Salaries are underspend by £183,000 due to vacant posts and Printing and Stationery by £10,000.

Reserves

- 3.4 Table 2 gives a breakdown of reserves, which at the end of 2024 total £554,568. The joint committee has agreed to keep £50,000 as a general balance, with the rest moved to earmarked reserves or used to reduce contributions as decided by the Joint Committee.

Table 2: Reserves at 31/03/2024	Earmarked	General
Review on Automation	£61,000	
Agency Cost Back Fill	£40,000	
Transfer to FERIS Reserve	£44,626	
ICT Reserve - ICT Kit & Server	£60,727	
Single employer project management costs	£99,016	
Balance B/F		£50,000
Underspend in year 2023/24 (Provisional)		£199,199
Total	£305,369	£249,199

3.5 There is increasing pressure to upgrade our IT systems and changes required. The above earmarked reserves have £161,727 of resources that can be used to assist with these pressures, as listed below.

- Review on Automation £61,000
- Agency Cost Back Fill £40,000
- ICT Reserve - ICT Kit & Server £60,727

3.6 However, there are potentially £383,350 of one off pressures and growing annual pressures for subscription fees associated with IT improvements needed. These cover the areas of Automation, software and Kit needs, plus Anti-fraud improvements. The table below covers the potential costs.

Table 3: Automation using Govtech	One – off set up cost	Year 1	Year 2	Year 3 Annually thereafter	P2P VPN Annually
HBBC	£8,600	£21,775	£26,000	£32,500	£500
NWLDC	£8,600	£21,775	£26,000	£32,500	£500
HDC	£8,600	£21,775	£26,000	£32,500	£500
Closing Balance 2023/24	£25,800	£65,325	£78,000	£97,500	£1,500

3.7 Customers adopting a Govtech digital process automation service for the first time and entering into an Initial Term commitment of not less than 3 years benefit from a reduction applied to annual fees in the first 2 years of the Initial Term. Reductions of 33% have been applied to first year annual service fees and 20% to the second-year annual service fees above. Further exploration of market needed , feasibility required together with Capita's offer and our use of their automation elements.

Table 3a Kit and software needs	Year 1	Year 2	Year 1 Annually	Year 2 Annually
Laptop and peripheral kit replacements December 2025	£94,000	£0	£0	£0
Migration to Server Desktop on the DHCi environment. This may cost more	£0	£80,000	£0	£0
Costs for Packaged applications	£0	£0		£20,000
XL Print Upgrade (Migration and Annual Hosting)	£14,250			£14,200
MoU needs (Encryption. Scrambler Tool and GDPR needs)	£45,000			
Enterprise upgrade	£14,300			
Strategic Improvement works (LRBP share)	£85,000			
Hub (SBRR identifier)	£5,000		£9,000	£9,000
Nexus	£8,000		£18,000	£18,000
Vist Module (possibly - need full investigation)	£12,000		£30,000	£30,000
Total	£277,550	£80,000	£57,000	£91,200

3.8 The Table below summarises the initial costs that could be funded from reserves and in year savings, and the annual ongoing costs that would fall on contributions. As there have been salary

savings, and posts have been removed from the establishment, the annual costs can be covered from the savings in salary costs running at £183,000.

Table 3b, Total use and pressures	Year 1	Year 2	Total From Reserves	Year 1 From Contributions	Year 2 From Contributions	Year 3 From Contributions	Annually from Contributions
Automation	£25,800	£0	£25,800	£66,825	£79,500	£99,000	£99,000
Kit and Software Needs	£277,550	£80,000	£357,550	£57,000	£91,200	£91,200	£91,200
Closing Balance 2023/24	£303,350	£80,000	£383,350	£123,825	£170,700	£190,200	£190,200

The initial costs will be funded from reserves and savings as follows:

Table 4, use of reserves to cover set up costs	
Opening ICT Earmarked reserves	£161,727
IN year savings transferred to Earmarked reserves.	£199,199
use of FERRIS ring fenced reserve	£25,000
Reserve available total	£385,926
Less set up costs	-£383,350
Left in reserve	£2,576

Appendix 1: Leicestershire Revenues & Benefits Partnership Monitoring Report to 31st March 2024

Expenditure / Income Type	2023/24 Latest Budget to Date	Actual to Date	Variance after Timing Differences		2023/24 Total Estimate (Original)		2023/24 Total Estimate (Revised)
	£	£	£		£		£
Employees	3,092,460	2,607,561	184,884		3,092,460		3,092,460
Premises Related Expenditure	42,310	42,312	-2		42,310		42,310
Transport Related Expenditure	15,000	8,599	5,087		15,000		15,000
Supplies & Services	942,720	925,166	16,365		942,720		942,720
Central & Administrative Exp	31,200	31,650	-450		31,200		31,200
Revenue Income	-4,123,690	-3,156,355	-6,684		-4,123,690		-4,123,690
Use of Reserves to Cover Automation Costs			0		0		0
Sum:	0	458,934	199,199		0		0

<u>Explanations</u>	Variance at 31/03/24(Over) / Under Spend £	Explanation £5k+
Salaries	183,000	This variance is due to a number of vacant posts during the year and after 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	2,000	Variance > £5k
Car Allowances	5,000	Variance > £5k
Flexible working	5,000	Variance > £5k
Computer Software & Maintenance	-8,000	Additional cost incurred for upgrade of Enterprise
Computer Consumables	4,000	Variance > £5k
Printing & Stationery	10,000	Printing costs lower than anticipated
Postages	-7,000	Postage Costs higher than anticipated
Liability Expenses	7,000	Court Costs lower than anticipated
Subscriptions	4,000	Variance > £5k
Minor Variances	1,000	Variance > £5k
Contributions	-7,000	Reduced contributions as a result of reduced court costs
	199,000	



Revenue and Benefit Service

Schedule of Meetings 2024/25

1. PURPOSE OF THE REPORT

1.1 For the Joint Committee to agree the schedule of meetings for the forthcoming year.

2. RECOMMENDATION

2.1 To consider the proposed schedule of meetings for 2024/25 attached at Appendix 1 of the report and agree the proposed schedule.

3. MAIN FEATURES OF THE SCHEDULES

3.1 Each year the Committee is asked to approve the schedule of meetings for the forthcoming year.

3.2 The proposed schedule of quarterly meetings for 2024/25 is attached at appendix 1 to the report.

3.3 The Joint Committee currently meets 4 times during the civic year and the dates of the meetings at Appendix 1 have been proposed in order for the committee to consider the quarterly performance reports at the appropriate time during the year.

3.4 Consideration has been given to statutory reports that have to be agreed by set dates.

3.5 Following the revision of the Constitution of the Joint Committee in May 2018, it states that the committee must also hold an Annual Meeting in June wherever possible but no later than July.

3.6 Currently all meetings are held on Thursdays at 3.30pm and are held in rotation around each of the Partnership authorities.

4. NEXT STEPS

4.1 Members are asked to consider the dates detailed in the appendices and notify the Democratic Services officer of any issues.

4.2 Once the dates are agreed, Democratic Services will book the venues and confirm the dates and locations to all Committee Members.

DRAFT SCHEDULE OF QUARTERLY MEETINGS – THE LEICESTERSHIRE PARTNERSHIP
JOINT COMMITTEE REVENUES AND BENEFITS

2024/25

Annual Meeting Thursday 25 July 2024 3.30pm Harborough DC

To be agreed Thursday 19 September 2024 3.30pm NWL, Coalville
 Thursday 21 November 2024 3.30pm HBBC Hinckley
 Thursday 16 January 2025 3.30pm Harborough DC
 Thursday 27 March 2025 3.30pm NWL, Coalville

2025/26

To be agreed
Annual Meeting Thursday 12 June 2025 3.30pm HBBC Hinckley

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FORWARD PLAN FOR JOINT COMMITTEE 2024-25

Decision	Date of Decision (approx.)	Contacts
Annual Meeting		
Schedule of meetings	25 July 2024	Democratic Services
Year End Performance Report	25 July 2024	Sally O’Hanlon – Head of Partnership
Year End Financial Report	25 July 2024	Ashley Wilson – Section 151 Officer
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
Financial Performance Report	November 2024	Ashley Wilson – Section 151 Officer
Performance Report	November 2024	Sally O’Hanlon – Head of Partnership
Budget Setting Report	January 2025	Ashley Wilson – Section 151 Officer
Financial Performance Report	January 2025	Ashley Wilson – Section 151 Officer
Service Plan 2023/24	January 2025	Sally O’Hanlon – Head of Partnership
Performance Report	January 2025	Sally O’Hanlon – Head of Partnership
Financial Performance Report	March 2025	Ashley Wilson – Section 151 Officer
Performance Report	March 2025	Sally O’Hanlon – Head of Partnership

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