

Public Document Pack



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, 12 JUNE 2025

Location

De Montfort Suite, Hinckley Hub

Officer to contact

Rebecca Valentine-Wilkinson

Email: [rebecca.valentine-wilkinson@hinckley-](mailto:rebecca.valentine-wilkinson@hinckley-bosworth.gov.uk)

bosworth.gov.uk

Tel: 01455 255834

Councillor P Beadle
Councillor S Bray
Councillor P Knowles

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.

Use of mobile phones

To minimise disturbance to others attending the meeting, please switch off your phone or other mobile device or turn it onto silent or vibrate mode.

Thank you

**LEICESTERSHIRE PARTNERSHIP REVENUES & BENEFITS JOINT COMMITTEE -
12 JUNE 2025**

A G E N D A

1. APPOINTMENT OF CHAIR

2. APPOINTMENT OF VICE-CHAIR

3. APOLOGIES FOR ABSENCE

To receive and note any apologies for absence.

4. 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.

5. MINUTES OF PREVIOUS MEETING (Pages 1 - 2)

To confirm the minutes of the previous meeting.

6. PERFORMANCE OUTTURN MARCH 2025 (Pages 3 - 12)

To inform members of the performance of the Partnership for the period April 2024 to March 2025

7. FINANCIAL OUTTURN APRIL 2024 TO MARCH 2025 (Pages 13 - 18)

To inform members of the financial performance of the Partnership for the period April 2024 to March 2025

8. INTERNAL AUDIT SCOPE

Verbal update to be provided

9. BUSINESS RATE CONSULTATION

Verbal update to be provided

10. SCHEDULE OF FUTURE MEETINGS (Pages 19 - 22)

To present the schedule of meetings for the forthcoming year.

11. FORWARD PLAN (Pages 23 - 24)

To note the joint committee's forward plan.

This page is intentionally left blank

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

27 MARCH 2025 AT 3.30 PM

PRESENT: Cllr KWP Lynch - Chair

Cllr Jo Asher and Cllr Woodman

Also in attendance:

Officers in attendance: Julie Kenny, Clive Mason, Sally O'Hanlon, Jon Owst, Paul Stone, Rebecca Valentine-Wilkinson and Ashley Wilson

16. **Apologies for absence**

Apologies for absence were submitted by Councillors Beadle, Graves, Wyatt and Bray, with the following substitutions authorised:

Councillor Jo Asher for Councillor Graves.

17. **Declarations of interest**

There were no interests declared at this meeting.

18. **Minutes of previous meeting**

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

RESOLVED –the minutes of the meeting held on 16 January be confirmed as a correct record.

19. **Performance report - January 2025**

Members were updated on the performance of the Partnership for January 2025.

Officers confirmed that:

- Leicestershire County Council were being chased for outstanding payments; and
- Staff were working closely with the communications team around social media posts with web links that included frequently asked questions, in order to support people around repayments and minimising avoidable contact.

Members noted the report.

20. **Financial Performance**

Members were updated on the financial performance of the Partnership for the period April 2024 to January 2025.

It was confirmed to members that the key variances to the end of January 2025 were:

- The salaries were underspent by £65,000 due to vacant posts at the end of January 2025;
- An additional cost of £16,000 had been charged to IT costs due to an audit of Microsoft licence conditions.

Members noted the report.

21. **Council Tax and NNDR Internal Audit final report**

Members were updated on the council tax and NNDR internal audit final report.

In response to a question from members around IT and if the instances reflected in the report were due to internal ICT failure, it was confirmed this was not the case. The software could be restrictive on occasions and did prohibit some tasks that needed manual intervention. The Partnership were looking at innovations to support this but it was not linked to hardware or infrastructure.

Members noted the report.

22. **Forward Plan**

Members noted the forward plan.

23. **Date of next meeting**

The date of the next meeting was confirmed as 12 June, 3.30p.m. at Hinckley & Bosworth Borough Council offices.

(The Meeting closed at 3.51 pm)

CHAIR



Revenue and Benefit Service

Performance Report March 2025

1. PURPOSE OF THE REPORT

1.1. To inform members of the performance of the Partnership for the period April 2024 to March 2025.

1.2. That performance is noted.

1.3. To approve the performance indicators for the financial year 2025/2026

Caseload Data								
Position at:				31/03/2024		2024/25		
Banded Council Tax Dwellings						Current Position (31/3/25)	Movement	Percentage Movement
HBBC				52,305		52,845	540	1.0%
HDC				44,398		44,892	494	1.1%
NWLDC				48,554		49,150	596	1.2%
Totals			Current Total:	145,257		146,887	1,630	1.1%
NDR Rated Assessments				Position		Current Position	Movement	Percentage Movement
HBBC				3,337		3,361	24	0.72%
Debit (£)			(previous month)		£45,664,633	£45,651,079	-£13,554	
HDC				3,296		3,340	44	1.33%
Debit (£)			(previous month)		£64,031,974	£63,650,391	-£381,583	
NWLDC				3,530		3,531	1	0.03%
Debit (£)			(previous month)		£111,771,409	£111,368,831	-£402,578	
Totals			Current Total:	10,163		10,232		
HB/CTLS Live Caseload				Caseload		Current Caseload	Movement	Caseload %
HBBC				5,202		5,210	8	
	Joint HB/CTS			1,735		1,437	-298	28%
	HB only			309		293	-16	6%
	CTS only			3,158		3,480	322	66%
HDC				3,129		3,079	-50	
	Joint HB/CTS			1,205		1,015	-90	33%

	HB only			168		148	-20	5%
	CTS only			1,756		1,916	160	62%
NWLDC				4,934		4,824	-138	
	Joint HB/CTS			1,944		1533	-411	32%
	HB only			188		151	-37	3%
	CTS only			2,802		3,140	338	65%
Totals	Current Total:			13,265		13,113	-152	

Performance Indicators

North West Leicestershire District Council													2024/25	Year End 2024/25 target
BENEFITS	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In month: New Claims (Days)	18.4	16.6	14.2	14.6	13.9	14.9	13	14.5	15	15.8	17.7	13.4	15	15
Position for 2023/24	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	
In month: Change Events (Days)	5.6	4.9	5.9	4.9	5.9	5.7	5.4	4.8	4.3	5.1	2.3	3.2	4.8	6
Position for 2023/24	6.9	8	5	4.6	4.9	5.3	5.7	5.5	5.4	6.5	2.2	5	5.4	
COUNCIL TAX	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In Year (%)	10.0%	19.1%	28.1%	37.3%	46.3%	55.4%	64.5%	73.5%	82.5%	91.5%	94.3%	97.2%	97.2%	97.3%
Position for 2023/24	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%	
Arrears Reduction (£m) end of month	£6.7m	£6.6m	£6.4m	£6.3m	£6.1m	£5.9m	£5.8m	£5.8m	£5.7m	£5.5m	£5.5m	£5.4m	£5.4m	INFO
Position for 2023/24	£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	
NON DOMESTIC RATES	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In Year (%)	8.9%	18.6%	26.9%	36.7%	45.5%	53.6%	62.3%	72.0%	80.3%	89.3%	93.1%	96.8%	96.8%	99.0%
Position for 2023/24	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%	
Arrears Reduction (£m) end of month	£3.3m	£1.6m	£2.7m	£2.3m	£3.0m	£3.1m	£3.2m	£3.2m	£3.2m	£3.0m	£3.0m	£2.8m	£2.8m	INFO
Position for 2023/24	£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	
HOUSING BENEFIT DEBT	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
HB Overpayments outstanding end of month	£1.4m	£1.4m	£1.3m	£1.3m	£1.3m	£1.3m	£1.3m	£1.3m	£1.3m	£1.3m	£1.3m	£1.3m	£1.3m	INFO
Position for 2023/24	£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	
HB Overpayments Recovered	1.6%	2.3%	6.9%	9.8%	11.3%	12.9%	15.7%	16.3%	16.6%	17.6%	18.0%	20%	20.0%	34%
Position for 2023/24	1%	3%	4%	5%	7%	8%	9%	10%	10%	11%	11%	13%	13%	
FRAUD	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		

CTLS Sanctions gained	0	0	0	2	1	0	0	0	3	0	1	2	9	6
Position for 2023/24	0	0	1	1	0	0	1	0	0	0	0	0	3	

Harborough District Council													Cumulative2024/25	Year - End 2024/25 target
BENEFITS	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In month: New Claims (Days)	19.2	16.5	20.4	17	15.5	14.4	13.6	15.1	14.6	13.4	12.9	15.6	15.7	15
Position for 2023/24	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	
In month: Change Events (Days)	5.1	5.4	6.7	5.2	6.3	5.5	3.9	3.9	4.7	5.8	2.0	4.4	4.9	6
Position for 2023/24	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	
COUNCIL TAX	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In Year (%)	10.5%	19.7%	29.0%	38.1%	47.1%	56.5%	65.7%	74.6%	83.6%	92.5%	95.3%	98.1%	98.1%	98.1%
Position for 2023/24	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%	
Arrears Reduction (£m) end of month	£3.8m	£3.7m	£3.6m	£3.5m	£3.4m	£3.3m	£3.2m	£3.2m	£3.1m	£3.0m	£3.0m	£3.0m	£3.0m	
Position for 2023/24	£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	
NON DOMESTIC RATES	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In Year (%)	8.9%	18.4%	27.6%	36.9%	46.2%	55.7%	65.1%	73.3%	81.8%	90.8%	95.0%	99.1%	99.1%	99.2%
This years profiled target (based on 22/23)	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%	
Arrears Reduction (£m) end of month	£0.4m	£0.2m	£1.0m	£0.2m	£0.1m	£0.03m	£-0.1m	£-0.1m	£-0.20m	£-0.25m	£-0.4	£-0.2m	£-0.2m	INFO
Position for 2023/24	£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	
HOUSING BENEFIT DEBT	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
HB Overpayments outstanding	£0.78m	£0.77m	£0.77m	£0.77m	£0.77m	£0.77m	£0.78m	£0.77m	£0.77m	£0.76m	£0.76m	£0.79m	£0.79m	INFO
Position for 2023/24	£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	
HB Overpayments Recovered end of month	1.2%	3.6%	5.3%	6.5%	7.4%	8.7%	9.7%	11.5%	12.5%	13.5%	14.5%	15%	15%	34%
Position for 2023/24	2%	3%	5%	5%	6%	7%	8%	9%	10%	11%	12%	14%	14%	
FRAUD	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
CTLS Sanctions gained	2	0	2	1	0	0	0	0	0	2	0	1	8	
Position for 2023/24	0	0	2	0	2	0	0	0	1	1	3	0	9	6

Hinckley & Bosworth Borough Council													Cumulative 2024/25	Year-End 2024/25 Target
BENEFITS	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In month: New Claims (Days)	17.9	18.4	15.2	15.3	14.6	13.0	12.2	11.7	11.7	15.2	15.6	14.7	14.6	
<i>Position for 2023/24</i>	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
In month: Change Events (Days)	6.1	4.5	5.9	5.8	5	5.7	5	4.5	4.0	5.6	1.9	3.4	4.8	6
<i>Position for 2023/24</i>	8.2	8.1	5	4.5	5.2	4.7	5	4.8	3.8	7	2.1	3.7	5.2	
COUNCIL TAX	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In Year (%)	10.5%	19.6%	28.6%	37.8%	46.8%	56.1%	65.2%	74.2%	83.2%	92.2%	94.8%	97.6%	97.6%	97.6%
<i>Position for 2023/24</i>	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%	
In Year Arrears Reduction (£) end of month	£5.9m	£5.8m	£5.7m	£5.5m	£5.4m	£5.3m	£5.2m	£5.2m	£5.1m	£4.9m	£4.9m	4.8m	£4.8m	INFO
<i>Position for 2023/24</i>	£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	
NON DOMESTIC RATES	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
In Year (%)	10.5%	20.0%	28.8%	39.1%	47.9%	56.6%	65.2%	73.6%	82.6%	91.7%	94.8%	97.8%	97.8%	98.8%
<i>Position for 2023/24</i>	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%	
Arrears Reduction (£m) end of month	£1.5m	£1.3m	£1.4m	£1.4m	£1.2m	£1.1m	£1.2m	£1.2m	£1.3m	£1.2m	£0.70m	£1.1m	£1.1m	INFO
<i>Position for 2023/24</i>	£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	
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	£1.0m	£1.1m	£1.1m	£1.1m	£1.1m	£1.1m	£1.2m	£1.1m	£1.1m	£1.1m	INFO
<i>Position for 2023/24</i>	£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	
HB Overpayments Recovered	1.5%	3.0%	4.5%	9%	10%	11%	12%	15%	16%	17.2%	20.6%	22%	22%	36%
<i>Position for 2023/24</i>	1%	4%	6%	7%	9%	11%	15%	16%	17%	19%	20%	21%	21%	
FRAUD	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar		
CTLS Sanctions gained	0	0	1	0	3	0	0	1	1	0	2	1	9	
<i>Position for 2023/24</i>	0	0	0	0	0	1	0	0	2	1	0	0	4	6

Local Authority Error (HB Subsidy)

Cumulative position:

HBBC	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March
Lower Threshold	£6,786	£11,664	£16,104	£20,588	£25,108	£29,276	£33,605	£38,457	£42,648	£46,961	£51,005	£55,093
Upper Threshold	£7,634	£13,122	£18,117	£23,162	£28,246	£32,936	£37,806	£43,264	£47,979	£52,831	£57,380	£61,980
Actual	£3,456	£7,752	£9,169	£11,365	£12,022	£12,455	£12,596	£13,701	£14,390	£14,865	£14,927	£15,353
Lower Tolerance	£3,330	£3,911	£6,934	£9,224	£13,086	£16,821	£21,010	£24,755	£28,258	£32,096	£36,077	£39,740
Upper Tolerance	£4,179	£5,369	£8,947	£11,797	£16,224	£20,481	£25,210	£29,562	£33,589	£37,966	£42,453	£46,627

HDC	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March
Lower Threshold	£5,119	£8,016	£10,945	£14,126	£16,925	£19,729	£22,870	£25,718	£28,441	£31,340	£33,988	£36,437
Upper Threshold	£5,759	£9,018	£12,313	£15,892	£19,041	£22,195	£25,728	£28,932	£31,996	£35,258	£38,237	£40,992
Actual	£852	£1,717	£2,572	£2,439	£6,681	£6,685	£6,677	£6,853	£6,993	£7,054	£8,656	£8,770
Lower Tolerance	£4,267	£6,298	£8,373	£11,688	£10,245	£13,044	£16,192	£18,865	£21,448	£24,286	£25,332	£27,667
Upper Tolerance	£4,907	£7,300	£9,741	£13,454	£12,360	£15,510	£19,051	£22,080	£25,003	£28,204	£29,580	£32,222

NWLDC	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March
Lower Threshold	£4,468	£10,983	£15,218	£19,284	£23,614	£27,366	£31,066	£35,267	£38,048	£42,039	£45,518	£48,951
Upper threshold	£5,027	£12,356	£17,120	£21,694	£26,566	£30,787	£34,950	£39,676	£42,804	£47,293	£51,208	£55,069
Actual	£1,574	£11,176	£13,029	£14,198	£15,899	£16,054	£38,269	£39,840	£39,987	£40,615	£40,943	£42,196
Lower Tolerance	£2,894	-£193	£2,189	£5,086	£7,715	£11,312	-£7,203	-£4,573	-£1,940	£1,424	£4,575	£6,755
Upper Tolerance	£3,453	£1,180	£4,091	£7,496	£10,667	£14,732	-£3,319	-£164	£2,816	£6,679	£10,264	£12,874

Housing Benefit overpayment analysis

HBBC	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Totals
Debt raised	£53,037	£15,616	£23,507	£35,126	£69,441	£27,386	£45,010	£38,723	£36,517	£70,237	£11,640	£14,782	£441,020
Partnership collection Rate	2%	3%	4%	9%	10%	11%	12%	15%	16%	17%	21%	22%	
Sundry Debt collection rate													
Combined													
Partnership anticipated collection rate	5%	9%	15%	19%	23%	25%	27%	28%	30%	32%	34%	36%	

HDC	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Totals
Debt raised	£11,250	£15,734	£12,072	£8,293	£17,112	£13,102	£11,471	£2,907	£10,309	£15,448	£19,231	£76,100	£213,029
Partnership collection Rate	1%	4%	5%	7%	7%	9%	10%	11%	12%	13%	15%	15%	
Sundry Debt collection rate													
Combined													
Partnership anticipated collection rate	3%	7%	11%	15%	17%	18%	21%	23%	25%	26%	29%	31%	

NWLDC	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Totals
Debt raised	£28,862	£48,987	£34,086	£31,964	£45,098	£47,356	£36,973	£18,747	£11,880	£14,313	£15,901	£8,809	£342,975
Partnership collection Rate	2%	3%	7%	10%	11%	13%	16%	16%	17%	18%	18%	20%	
Sundry Debt collection rate													
Combined													
Partnership anticipated collection rate	4%	4%	11%	16%	19%	20%	23%	24%	26%	29%	31%	34%	

Benefits Operational Team

(Housing Benefit, Council Tax Support and Fraud)

Speed of Processing

All 3 LA's are meeting the processing time target for change of circumstances. HBBC are meeting the target for processing new claims, with NWLDC and HDC being slightly behind. All showed an improvement in the 2023/24 processing performance.

Revenues Operational Team

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

Council Tax collection

HBBC and HDC have met the council tax performance target, with NWLDC within 0.07% equating to £56k. The actual amount collected by all three LAs is over £9m higher than last year, an increase of between 12% and 13% at each LA. Collection rates have been broadly maintained despite these large increases.

Business Rate collection

HBBC are within 1% of the non-domestic rates performance target, with HDC within 0.07%. NWLDC has been impacted by large uncollectable assessments within the East Midlands Freeport. The impact of these assessments is detailed below. It is expected that these assessments will be resolved in 2025/26, though this is dependent on external factors beyond our control or influence.

	Total	Large EMF assessments removed
Net collectible debit	£110,915,707.05	£108,222,334.69
Amount collected	£107,374,562.74	£107,374,562.74
Collection percentage	96.8%	99.2%
Distance from target	2.2% below target	0.1% above target

The actual amount collected when compared to last year has increased by £8m (22%) for HBBC, £12.9m (26%) for HDC, and £29m (37%) for NWLDC.

Suspense account access

There are occasions where customer payments cannot be automatically allocated to their account and are held in a suspense account. Both the Council Tax and Business Rates teams sought to interrogate these accounts to identify any payments that could be allocated.

For NWLDC and HDC, access was granted extremely late, and with insufficient detail to allow missing payments to be allocated, affecting the total amount collected in year. Whilst it is not possible to put a figure to this impact, improved access in this area would certainly make a positive difference to the in-year collection.

Along with delays in posting payment files from HDC, both LRBP and customer services teams have had to do additional work to remedy and correct this, at the expense of time spent dealing with customers and collecting due amounts.

Annual billing and year-end review

A review of the annual billing and year-end processes will be held in May, with any learning from this shared to improve the process for future years. Views will be sought from LRBP staff, Finance, Customer Services, and ICT teams.

It was suggested that targets were slightly reduced for 24.25 ; it was agreed to leave as they were for the previous year to give challenge. The outcomes are excellent given the challenges we see our customers experiencing.

Performance Indicators 2025/2026

After consultation with the Management Board approval is sought to retain the same performance targets as the previous year; noting these are stretching and in some cases weren't met.

This page is intentionally left blank



Leicestershire Partnership Revenues & Benefits

Draft Outturn 31 March 2025

Joint Committee

1. PURPOSE OF THE REPORT

- 1.1 To inform the Joint Committee of the financial performance of the Partnership for the period April 2024 to March 2025.

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 has been outlined in **Appendix 1** to this report. The key headlines are detailed below for information.
- 3.2. As of 31 March 2025, the Partnership had an overall net underspend on expenditure of £86,730 as a variance to date, with an overall net underspend of £84,372. Therefore, at the year end, there is an overall underspend on expenditure due to the vacancy position noted below.

Table 1 31 March 2025	Budget to Date	Actual to Date	Variance to Date
INCOME	(£4,299,430)	(£4,297,072)	£2,358
EXPENDITURE	£4,299,430	£4,212,700	(£86,730)
Net Expenditure Over / (Under) Spend	£0	(£84,372)	(£84,372)

- 3.3 The key variances to the end of March 2025 to bring to the attention of the Joint Committee are:
- Salaries are underspent by £70,000 due to vacant posts at the end of March 2025. Other small variances increase the year end underspend to £84,000.
 - Due to an audit of Microsoft license conditions, an additional £12,000 has been charged to IT costs.

Reserves (As report to Joint Committee)

- 3.4 Table 2 gives a breakdown of reserves, which at the end of 2023/24 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. The extra £84,372 forecast would increase this to £638,940.

Table 2: Reserves at 31/03/2024	Earmarked	General	Total
Review on Automation	£61,000		£61,000
Agency Cost Back Fill	£40,000		£40,000
Transfer to FERIS Reserve	£44,626		£44,626
ICT Reserve - ICT Kit & Server	£60,727		£60,727
Single employer project management costs	£99,016		99016
Balance B/F		£50,000	£50,000
Underspend in year 2023/24		£199,199	£199,199

Table 2: Reserves at 31/03/2024	Earmarked	General	Total
Total (Reported to JC)	£305,369	£249,199	£554,568
Forecast underspend (Use for IT pressures)	£84,372		£84,372
Forecast Total at year end	£389,741	£249,199	£638,940

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 pressure 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 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

Table 3a Kit and software needs	Year 1	Year 2	Year 1 Annually	Year 2 Annually
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 to some extent from the savings in salary costs.

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 (Govtech)	£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	
Earmarked reserves (including 2024/25 savings)	£389,741
Less set up costs	-£383,350
Left in reserve Earmarked reserves	£6,391
Left in General Reserve	£249,199

- 3.9 The £249,199 would cover most of the additional contributions for year 1 and 2 if the changes were implemented. This would protect the partners from these costs on the run up to LGR. Therefore at this stage the additional saving are being retained in reserves to offset these costs.

Appendix 1: Leicestershire Revenues & Benefits Partnership Monitoring Report to 31st March 2025

Expenditure / Income Type	2024/25 Latest Budget to Date	Actual to Date	Timing Differences	Variance after Timing Differences		2024/25 Total Estimate (Original)		2024/25 Total Estimate (Revised)
	£	£	£	£		£		£
Employees	3,236,620	2,868,823	290,122	77,675		3,236,620		3,236,620
Premises Related Expenditure	43,580	43,580		0		43,580		43,580
Transport Related Expenditure	15,000	8,392	1,510	5,098		15,000		15,000
Supplies & Services	973,030	966,370	2,703	3,958		973,030		973,030
Central & Administrative Exp	31,200	31,200		0		31,200		31,200
Revenue Income	-4,299,430	-3,386,080	-910,992	-2,358		-		-
						4,299,430		4,299,430
Sum:	0	532,285	-616,657	84,372		0		0

Timing Differences

	HDC	NWLDC	HBBC	Total
Salaries - Quarter 4 - 2024/25	84,772	205,350		290,122
Mileage & Disturbance Costs - Quarter 4 - 2024/25	60	1,450		1,510
Supplies & Services - Quarter 4 - 2024/25	616	2,087		2,703
Contributions - Quarter 4 - 2024/25	-244,274	-309,708	-357,011	-910,992
	-158,826	-100,821	-357,011	-616,657

<u>Explanations</u>	Variance at 31/12/24(Over) / Under Spend £	Explanation £5k+
Salaries	70,000	This is due to several vacant posts and is after including the agreed pay award, payable to date, in the figures above
Training	5,000	Variance < £5k
Other Minor Employee Related Costs	3,000	Variance < £5k
Car Allowances	5,000	Variance < £5k
Computer Software & Maintenance	-12,000	Additional Microsoft costs
Computer Consumables	5,000	Variance > £5k
Printing & Stationery	7,000	Printing lower than anticipated
Postages	-17,000	Postage Costs lower than anticipated
Liability Expenses	11,000	Court Costs lower than anticipated
Subscriptions	4,000	Variance < £5k
Minor Variances	5,000	Variance < £5k
Other Income	9,000	Income received to cover additional cost included above
Contributions	-11,000	Reduced contributions because of reduced court costs
	84,000	



Revenue and Benefit Service

Schedule of Meetings 2025/26

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 2025/26 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 2025/26 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 confirm the dates and locations to all Committee Members.

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

2025/26

Annual Meeting	Thursday 12 June 2025	3.30pm HBBC Hinckley
	Thursday 18 September 2025	NWL, Coalville
	Thursday 20 November 2025	Harborough DC
	Thursday 22 January 2026	Hinckley BBC
	Thursday 26 March 2026	NWL, Coalville

2026/27

Annual Meeting	Thursday 25 June 2026	Harborough DC
----------------	-----------------------	---------------

This page is intentionally left blank

FORWARD PLAN FOR JOINT COMMITTEE 2025-2026

Decision	Date of Decision (approx.)	Contacts
Year End Performance Report	Annual meeting June 2025	Sally O'Hanlon – Head of Partnership
Year End Financial Report	June 2025	Ashley Wilson – Section 151 Officer
Schedule of meetings	June 2025	Democratic Services
Audit Review Plan	September 2025	Ashley Wilson – Section 151 Officer
Financial Performance Report	September 2025	Ashley Wilson – Section 151 Officer
Performance Report	September 2025	Sally O'Hanlon – Head of Partnership
Financial Performance Report	November 2025	Ashley Wilson – Section 151 Officer
Performance Report	November 2025	Sally O'Hanlon – Head of Partnership
Budget Setting Report	January 2026	Ashley Wilson – Section 151 Officer
Financial Performance Report	January 2026	Ashley Wilson – Section 151 Officer
Service Plan 2025/26	January 2026	Sally O'Hanlon – Head of Partnership
Performance Report	January 2026	Sally O'Hanlon – Head of Partnership
Financial Performance report	March 2026	Ashley Wilson – Section 151 Officer
Performance Report	March 2026	Sally O'Hanlon – Head of Partnership
Internal Audit Final report	March 2026	Mazars – Internal Auditors

This page is intentionally left blank