



## SHARED REVENUES AND BENEFITS JOINT COMMITTEE

**Monday, 25 November 2019**

**10.00 am**

**Committee Room 1 - City Hall**

- Membership: Councillors Ray Cucksey (North Kesteven District Council), Nikki Dillon (North Kesteven District Council), Rosanne Kirk and Ric Metcalfe (City of Lincoln Council)
- Substitute members: Councillors Michael Kent (North Kesteven District Council), David Suiter (North Kesteven District Council) and Donald Nannestad (City of Lincoln Council)
- Officers attending: Democratic Services (City of Lincoln Council), Jaclyn Gibson (City of Lincoln Council), Philip Roberts (North Kesteven District Council), Claire Moses (City of Lincoln Council), Russell Stone (North Kesteven District Council) and Martin Walmsley (City of Lincoln Council)

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**Details of Next Meeting:** Wednesday, 5 February 2020 (2.00 pm) in North Kesteven District Council Offices

**Present:** Councillor Ray Cucksey (*in the Chair*),  
Councillor Nikki Dillon, Councillor Rosanne Kirk and  
Councillor Ric Metcalfe

**Apologies for Absence:** None.

**13. Confirmation of Minutes - 3 June 2019**

RESOLVED that the minutes of the meeting held on 3 June 2019 be confirmed.

**14. Declarations of Interest**

No declarations of interest were received.

**15. Performance Update**

Purpose of Report

To provide the Joint Committee with an update on performance in the Revenues and Benefits Shared Service.

**Decision**

That the report be noted.

Alternative Options Considered and Rejected

None.

Reason for Decision

Updates were noted on the following aspects of the Shared Service:

*Council Tax*

The table at paragraph 4.2 of the report showed the in-year collection period for the current financial year 2019/20 up to the end of July, compared to the same point in 2018/19, together with outturn for 2018/19.

As at the end of July 2019, Council Tax in-year collection was down by 0.31% and 0.40% for the City of Lincoln and North Kesteven, respectively. For the City of Lincoln the reduced collection rate equated to £140,247, however, the net collectible debit had increased by £2.9 million with the total net receipt having increased by £895,004. With regard to North Kesteven, the reduced collection rate equated to £263,673, however, the net collectible debit had increased by £4.8 million and total net receipt had increased by £1.6 million. There had also been an additional 569 properties added to the taxbase compared to April 2018.

Council Tax support caseload for both authorities was reducing, as outlined in the table at paragraph 4.3 of the report. The declining caseload partially explained the reasons for a drop in in-year collections and officers were currently working

on a proactive Council Tax support take-up campaign to ensure taxpayers were receiving what they were entitled to.

Committee were further updated that at the end of August 2019, Council Tax in-year collection was down by 0.01% and 0.49% for the City of Lincoln and North Kesteven, respectively.

### *Business Rates*

The table at paragraph 4.5 of the report showed the Business Rates in-year collection period for the current financial year 2019/20 up to the end of July, compared to the same point in 2018/19, together with whole year outturn figures for 2018/19.

As at the end of July 2019, Business Rates in-year collection was down by 1.98% for the City of Lincoln, however, collection was up by 0.15% and 0.58% for North Kesteven and West Lindsey respectively. For the City of Lincoln the reduced collection rate of 1.98% equated to £893,472 of the net collectable debit, with total net liability having decreased by £362,820 and total net receipt having decreased by £1,055,010. Officers were currently in the process of ascertaining the reasons for these reductions. With regard to North Kesteven the increased collection rate equated to £42,307 of the net collectable debit, with total net liability having increased by £562,585. For West Lindsey the increased collection rate of 0.58% equated to £103,707 of the net collectable debit, with total net liability having increased by £348,288 and total net receipt also increased by £251,938.

Committee were further updated that at the end of August 2019, Business Rates in-year collection was down in the region of 1.5% for the City of Lincoln, and North Kesteven respectively.

### *Outstanding Revenues Customers*

The table at paragraph 4.8 of the report showed how many items of revenues customers' correspondence was outstanding up to the end of July 2019, compared to the same point in 2018/19 and the final position at the end of 2018/19.

Although outstanding figures had increased by a total of 567 from the end of 2018/19, the position as at the end of July compared to that of the same point in the previous year was only 13 more for Lincoln and 50 more for North Kesteven. Further progress had been made regarding the introduction of e-forms which collected data sooner and in a more efficient manner, meaning that this large influx of work could be dealt with earlier in the financial year.

Committee were further updated that at the end of August 2019, figures were slightly up due to the holiday season and staff leave, however, both authorities were in a strong position moving forward.

### *Housing Benefit Overpayments*

The table at paragraph 4.11 of the report showed outstanding debt for the current financial year 2019/20 up to the end of June, compared to the 'baseline' point at which a specific overpayments project commenced in May 2018.

A separate item specifically on this matter was included as a later agenda item at this meeting.

### *Benefits Performance*

The table at paragraph 5.1 of the report showed the number of outstanding benefits customers awaiting assessment up to the end of July 2019, compared to the same point in 2018/19 and the final position at the end of 2018/19.

A dedicated plan to reduce outstanding work levels had been in place which had resulted in a significant reduction of outstanding work in quarter one, with the age of the oldest item of outstanding work generally being maintained at a level of around one week.

In terms of Housing Benefit average processing times, the table at paragraph 5.2 of the report showed figures for new claims and changes in circumstances. Performance for all measures was now looking positive moving forward. Processes had been, and continued to be, reviewed and it was envisaged that new claims performance could improve further as the financial year progressed.

Universal Credit continued to have an impact on processing times due to the number of Universal Credit related documents requiring processing, as well as officers awaiting Universal Credit related decisions before putting Housing Benefit into payment in some cases.

Prompt processing of claims remained vital, but of equal importance was accuracy of processing. The table at paragraph 5.3 of the report set out the outcome of claims checked under the quality checking regime implemented by the Shared Service. The level of performance was improving and being maintained which was particularly pleasing in light of the rollout of Universal Credit making some assessments more complex. There had continued to be a concentration on checking claims more likely to be assessed incorrectly first time. It was reported that even £0.01p was counted as financially incorrect and in addition to these targeted checks, more checks were also carried out as part of the rolling annual subsidy claim checking regime.

Committee were further updated that at the end of August 2019, the number of outstanding benefit customers awaiting assessment was down at 782 for the City of Lincoln and 272 for North Kesteven. The average number of days for processing new claims and changes of circumstances was also down at 25.16 days for City of Lincoln and 21.75 days for North Kesteven. In terms of accuracy, outcome of claims checked under our quality checking regime at the end of August was 93.72% for City of Lincoln and 96.91% for North Kesteven.

## **16. Revenues and Benefits - Financial Monitoring Quarter 1 2019/20**

### Purpose of Report

To present the Joint Committee with the first quarter's performance for the Revenues and Benefits Shared Service for 2019/20.

### **Decision**

That the report be noted.

## Alternative Options Considered and Rejected

None.

## Reason for Decision

The approved budget for 2019/20 was agreed by the Revenues and Benefits Joint Committee on 19 February 2019 where the Committee set a budget for 2019/20 of £2,367,000 for the service, which had since been increased after receipt of New Burdens Grants, totalling £80,981.

Financial performance for the first quarter of 2019/20 was set out in Appendix 1 to the report which identified an overspend against the approved budget of £15,687.

The forecast outturn for 2019/20 predicted that there would be an underspend against the approved budget of £95,379. A summary of the main forecast year-end variations against the approved budget for 2019/20 was noted as follows:

- IT costs – budget to be aligned to reflect the actual value during 2020/21 budget setting process;
- Salaries, including career grades – vacant hours together with career graded posts budgeted at top of scale even though not all officers are at the top of the grade. Additional agency staff costs assumed for April to May 2019 only;
- New Burdens Grants – new burdens funding, offset against specific IT costs incurred, but the cost of additional activities would be contained within the current staffing structure.

## **17. Housing Benefit Overpayments Update**

### Purpose of Report

To provide the Joint Committee with an update on the recovery of Housing Benefit overpayments.

### **Decision**

That the report, the extension of the current Housing Benefits Overpayment Recovery Team to 31 March 2020, and that future Housing Benefit Overpayment updates would be included within the overall performance report to this Committee be noted.

## Alternative Options Considered and Rejected

None.

## Reason for Decision

As reported at previous meetings of this Committee, the Housing Benefit Overpayment Recovery Action Plan had been used as a working document and provided the Housing Benefit Overpayment Recovery Team with a clear direction with regard to its workload and prioritisation. A number of key actions already undertaken were set out in paragraph 5.2 of the report. The Action Plan continued to be monitored by the Revenues and Benefits Manager and formed part of meetings with the Benefit Team Leader and the Housing Benefit

Overpayment Recovery Team. Recovery methods would be continually reviewed, along with the effectiveness of the work undertaken by the team, as part of these meetings.

The table at paragraph 6.2 of the report showed the improvements for the City of Lincoln and North Kesteven since the project commenced in June 2018, which equated to an overpayment reduction of £991,386, including write offs. £684,065 of this was attributable to the City of Lincoln and £307,321 was attributable to North Kesteven.

It was reported that whilst the value of overpayments outstanding was decreasing, staff were still creating overpayments which often occurred due to delays in changes in circumstances being processed caused either by customers, the Department for Work and Pensions or even the Shared Services itself.

In-year rates of recovery were positive, with the in-period collection rate for 2019/20 as at the end of July 2019 so far being 116.06% and 91.44% for the City of Lincoln and North Kesteven, respectively.

The Department for Work and Pensions' Performance Development Team had undertaken an on-site visit, which had been anticipated after twelve months in implementation, and had been very positive during the review having acknowledged a noticeable change in processes, results and culture. There were also a number of areas of recommended development and improvement, with Appendix 1 of the report outlining the findings of the visit and review.

It was reported that, due to the Housing Benefits Overpayment Recovery Team continuing to reduce the level of overpayments, the term for the team, which was originally 30 September 2019, would be extended to 31 March 2020.

## **18. Business Rates Update**

### Purpose of Report

To provide the Joint Committee with an update on current issues within non-domestic rates.

### **Decision**

That the report be noted.

### Alternative Options Considered and Rejected

None.

### Reason for Decision

The following updates were noted:

#### *Supporting Small Business Relief Scheme*

This relief was made available to those ratepayers who faced a large increase as a result of the loss of small business or rural rate relief. The transitional relief scheme did not provide support in respect of changes in reliefs, therefore, those ratepayers who lost some or all of their small business or rural rate relief may

have faced very large percentage increases in bills from April 2017. Further details relating to the support provided as part of this scheme were set out in paragraph 4.1 of the report.

The number of hereditaments that had been identified for 2018/19 and 2019/20 and had benefitted from the scheme as at 30 April 2019 for the City of Lincoln, North Kesteven and West Lindsey were set out in the tables at paragraph 4.1 of the report.

#### *Discretionary Relief Scheme*

The table at paragraph 4.2 of the report showed the number of accounts identified and the total cost of relief for the years 2017/18 to 2019/20 for comparison purposes. A review of the awards had taken place and any additional awards for 2018/19 would be made prior to the annual deadline of 30 September 2019. In addition, a review of awards for 2019/20 would take place in November 2019 and the initial banding scheme would be adjusted to allow for further relief to be awarded.

It was noted that this was a discretionary relief which the local authority was compensated for.

#### *Retail Discount*

One of the announcements affecting Business Rates as part of the Autumn Budget 2018 was regarding high streets. To provide upfront support through the business rates system, the Government was cutting bills by one third for retail properties with a rateable value below £51,000, benefitting up to 90% of retail properties for two years from April 2019, subject to aid status. Eligible criteria had been provided and local authorities would be reimbursed using a grant under Section 31 of the Local Government Act 2003.

Retail discount awarded for 2019/20 was set out in the table at paragraph 4.3 of the report.

It was noted that this was a discretionary relief which the local authority was compensated for.

#### *Recent Court of Appeal Decision – Automated Transaction Machines*

Further to previous reports to this Committee on the Court of Appeal Decision regarding Automated Transaction Machines, it was noted that this continued to have implications for local authorities. Automated Transaction Machines were now included as an appeal threat and provision would need to be made for potential refunds. The potential impact for the City of Lincoln, North Kesteven and West Lindsey was noted as £498,739, £236,530 and £132,851 respectively.

#### *City of Lincoln Business Rates Growth Policy*

The City of Lincoln Council implemented its Business Rates Growth Policy from 1 April 2019 which aimed to a time-limited rate relief discount to new and extended business premises within the city in the interests of building the Business Rate base, supporting economic growth and job creation. A copy of the Policy was appended to the report.



Since the introduction of the Policy, four businesses had been awarded this relief totalling £55,123.

#### *North Kesteven Business Rates Growth Policy*

North Kesteven District Council implement its Business Rates Growth Policy in 2016. The rationale for offering businesses incentives to grow and locate in North Kesteven was derived from the 'Our Economy' priority published in the Council's Corporate Plan 2017-2020.

Since the introduction of the Policy, six businesses had been awarded this relief, totalling £411,230.

#### *Non-Domestic Rates Legislation Changes*

There had been a number of changes to Non-Domestic Rates legislation due to the introduction of new reliefs to be awarded to businesses. In addition to this, there were significant legislation changes which were to be in place from 1 April 2020 and beyond. These legislation changes had formed part of the one-to-one process with the Non-Domestic Rates Team Leader, ensuring the Shared Service was prepared and proactive in undertaking the required work to introduce the new legislation. This would include system changes, training of staff and communication to businesses.

It was noted that some of the legislation was still in the early stages of conception, with requirements for Ministry of Housing, Communities and Local Government to engage with billing authorities.

### **19. Welfare Reform and Universal Credit Update**

#### Purpose of Report

To provide the Joint Committee with an update regarding the national and local position of welfare reform, with a specific focus on national Universal Credit.

#### **Decision**

1. That an update on progress made by the Department for Work and Pensions (DWP) be reported at the next meeting of this Committee.
2. That the report be noted.

#### Alternative Options Considered and Rejected

None.

#### Reason for Decision

The following updates contained within the report released on 16 July 2019 were noted:

- 2,171,997 households were currently receiving Universal Credit, of which 697,789 were in employment;
- the Department for Work and Pensions had announced that it was development a Private Landlord Portal;

- recent changes as a result of the Autumn 2018 budget announcements, along with how these would impact customers and the respective local authority.

Committee were further updated that at the end of August 2019, 2.3m households were currently receiving Universal Credit of which 76,000 were in employment.

The report also set out progress to date on the Shared Service's 'high level' Welfare Reform Strategy Action Plan, which would continue to be monitored by the Joint Committee on a quarterly basis. Updates on progress were set out in Appendix 2 of the report, with the action plan being fluid and flexible to respond to changes in welfare reform related priorities, changes and demands.

## **20. Exclusion of the Press and Public**

RESOLVED that the press and public be excluded from the meeting during consideration of the following items of business because it is likely that if members of the public were present there would be a disclosure to them of 'exempt information' as defined by Section 100I and Schedule 12A to the Local Government Act 1972.

## **21. Universal Credit Support Update**

### Purpose of Report

To provide the Joint Committee with an update regarding Universal Credit support, particularly in respect of arrangements for 2019/20.

### **Decision**

That the recommendations contained within the report together with the verbal update provided giving the most up to date position regarding Universal Credit support be noted.

### Alternative Options Considered and Rejected

None.

### Reason for Decision

A proactive and holistic approach to Universal Credit support had been in place within the Shared Service since full rollout at Lincoln Jobcentre Plus in March 2018 followed by full rollout at Sleaford Jobcentre Plus in November 2018.

A central government decision had resulted in a national contract for Citizens Advice to deliver Universal Credit support for the financial year 2019/20. The report set out current arrangements at the City of Lincoln and North Kesteven.

## **22. Revenues and Benefits Software System Procurement**

### Purpose of Report

To provide the Joint Committee with an update regarding the procurement of the Revenues and Benefits system software.

**Decision**

That the recommendations contained within the report be noted.

Alternative Options Considered and Rejected

None.

Reason for Decision

The report provided an update on the current procurement process for the Revenues and Benefits system software, including renewal dates and costings.

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**SUBJECT: PERFORMANCE UPDATE**

**DIRECTORATE: CHIEF EXECUTIVE**

**REPORT AUTHOR: MARTIN WALMSLEY, HEAD OF SHARED REVENUES AND BENEFITS**

## 1. Purpose of Report

- 1.1 To provide Members with an update on performance in the Revenues and Benefits shared service.

## 2. Executive Summary

- 2.1 This report provides an update on Revenues and Benefits performance information – up to the end of Quarter 2 2019/20.
- 2.2 The Revenues and Benefits Shared Service has now been in operation since 1<sup>st</sup> June 2011, and performance has been maintained and improved whilst continuing to provide value for money. Continual improvement and success is being achieved in terms of both statistical and financial performance, as well as positive outcomes for customers of the partner local authorities.

## 3. Background

- 3.1 At the 6<sup>th</sup> September 2019 meeting of this committee, a report was presented detailing Revenues and Benefits performance up to the end of July 2019.
- 3.2 Performance is reported to this committee on a quarterly basis.

## 4. Revenues Performance

### 4.1 Council Tax

- 4.2 The table below shows Council Tax in-year collection period for the current financial year 2019/20 up to the end of Quarter 2, compared to the same point in 2018/19.

Financial Year	End Quarter 2 2019/20	End Quarter 2 2018/19
City of Lincoln	52.87%	52.80%
North Kesteven	57.42%	57.77%

- 4.3 As at the end of Quarter 2 2019/20, Council Tax in-year collection for City of Lincoln is up

by 0.07% and North Kesteven down by 0.35%.

For City of Lincoln, not only is collection marginally higher than in the year prior (by 0.07% - equivalent to £31,429), but the net collectable debit has also increased by £2,955,109.

For North Kesteven, the reduced collection rate of 0.35% equates to £230,952. However, the net collectable debit has increased by £4,685,501 and total net receipt has increased by £2,471,812. In-year collection was down by 0.49% at the end of August 2019 (equivalent to a reduction of £323,221) – which shows the improvement in September 2019. There has been an additional 573 properties added to the taxbase compared to April 2018.

#### 4.4 Business Rates

4.5 The table below shows Business Rates in-year collection period for the current financial year 2019/20 up to the end of Quarter 2 2019/20, compared to the same point in 2018/19.

Financial Year	End Quarter 2 2019/20	End Quarter 2 2018/19
City of Lincoln	59.58%	60.57%
North Kesteven	63.00%	63.31%
West Lindsey	58.80%	58.39%

4.6 As at the end of Quarter 2 2019/20, Business Rates in-year collection is down by 0.99% for City of Lincoln, down by 0.31% for North Kesteven, but up by 0.41% for West Lindsey.

In respect of City of Lincoln, the reduced collection rate of 0.99% equates to £446,555 of the net collectable debit. Total net liability has increased by £60,882 and total net receipt has decreased by £411,427. In-year collection was down by 1.61% at the end of August 2019 (equivalent to a reduction of £784,462) – which demonstrates improvement in September 2019.

For North Kesteven, the decreased collection rate of 0.31% equates to £87,663 of the net collectable debit. Total net liability has increased by £808,072 and total net receipt has decreased by £367,226.

For West Lindsey, the increased collection rate of 0.41% equates to £73,424 of the net collectable debit. Total net liability has increased by £286,462, total net receipt also increasing (by £241,829).

#### 4.7 Outstanding Revenues Customers

4.8 The table below shows how many items of Revenues Customers' correspondence is outstanding up to the end of Quarter 2 2019/20, compared to the same point in 2018/19. The table also shows the position at the end of Quarter 1 2019/20, and the year outturn 2018/19.

<b>Financial Year</b>	<b>End Quarter 1 2019/20</b>	<b>End Quarter 2 2019/20</b>	<b>End Quarter 2 2018/19</b>	<b>2018/19 (year outturn)</b>
<b>City of Lincoln</b>	616	<b>1,177</b>	766	437
<b>North Kesteven</b>	316	<b>571</b>	376	201

- 4.9 Although outstanding numbers have increased by a total of 816 from the end of Quarter 1 2019/20, and by 606 compared to Quarter 2 2018/19, it should be noted that the team is now in a strong position to move forward. As previously advised to this committee work has, and still is, taking place earlier in the financial year – for example, registration of students for Council Tax with appropriate discounts and exemptions. This is largely due to one of the e-forms developed which collects data sooner and in a more efficient manner, meaning this large influx of work can be dealt with earlier in the financial year. Also, there has been a reduction in staffing resources – however, these positions have now been filled so will have a positive impact over the second half of the financial year.
- 4.10 The student verification process set up working in partnership between the Council Tax Administration Team and City of Lincoln Business Development Team, has had a significantly positive impact this year.

Student verification spreadsheets have been returned from the University of Lincoln and of the 5,300 students on Council Tax records for this year, the University has validated 4,900 of them. This means the Council Tax Administration Team now has just 400 students which need to be followed up as they have not been verified (to confirm with landlords whether they have in fact started their course, and if they have, obtain the student certificates for them).

Prior to the verification process, the Council Tax Administration Team would have had to manually check these and then if they found someone not on the list, contact the University to confirm they are/ are not a student before following up with further enquiries. Officers estimate the more automated verification process has saved as much as 400 hours, or in real terms, in previous years, these student changes would not usually be completed until the following February – which means the Council Tax Administration Team is now going to be able to concentrate on reducing other areas of outstanding work.

In addition, the new process has resulted in Council Tax accounts being adjusted quickly, and accurate bills being issued.

#### 4.11 Housing Benefit Overpayments

- 4.12 The table below shows outstanding Housing Benefit overpayment debt up to the end of Quarter 2 2019/20, compared to the same point in 2018/19. The table also shows the position at the end of Quarter 2 2019/20, and the year outturn 2018/19.

<b>Financial Year</b>	<b>End Quarter 1 2019/20</b>	<b>End Quarter 2 2019/20</b>	<b>End Quarter 2 2018/19</b>	<b>2018/19 (year outturn)</b>
<b>City of Lincoln</b>	£4,009,365	<b>£3,795,553</b>	£4,061,218	£3,973,125

<b>North Kesteven</b>	£1,658,209	<b>£1,625,080</b>	£1,703,094	£1,643,394
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4.13 In terms of 'in-period' collection of Housing Benefit Overpayments – i.e. the £ collected as a percentage of the £ raised, these are shown in the table below:

<b>Financial Year</b>	<b>End Quarter 1 2019/20</b>	<b>End Quarter 2 2019/20</b>	<b>End Quarter 2 2018/19</b>	<b>2018/19 (year outturn)</b>
<b>City of Lincoln</b>	92.78%	<b>101.25%</b>	105.48%	100.38%
<b>North Kesteven</b>	84.03%	<b>95.63%</b>	124.61%	107.45%

4.14 Therefore, collection of Housing Benefit overpayments continues to be positive, with proactive arrangements in place. Officers have also written an article for a professional publication (IRRV Benefit magazine <https://www.irrv.net/homenew/item.php?iid=26067&wid=52&did=0>) regarding the piece of work with Department for Work and Pensions to improve overpayments processes and performance, which took place over the last eighteen month. It is anticipated this article will appear in the December 2019 edition of this publication, which is really positive for our shared service and our commitment to both improving performance and to partnership working.

## 5. Benefits Performance

5.1 The table below shows the number of outstanding Benefits customers awaiting assessment, up to the end of Quarter 2 2019/20, compared to the same point in 2018/19. The table also shows the position at the end of 2018/19.

<b>Financial Year</b>	<b>End Quarter 1 2019/20</b>	<b>End Quarter 2 2019/20</b>	<b>End Quarter 2 2018/19</b>	<b>2018/19 (year outturn)</b>
<b>City of Lincoln</b>	624	<b>939</b>	1,520	897
<b>North Kesteven</b>	331	<b>283</b>	471	502

The proactive action plan in place to reduce outstanding work levels continues to work effectively, although it is recognised the level has increased by a total of 267 from the end of Quarter 1 to the end of Quarter 2 2019/20 – however is 769 lower than at the end of Quarter 2 2018/19. Increased leave over the summer period has had an impact, however this continues to be tackled positively and a verbal update will be provided to this committee on 25<sup>th</sup> November.

5.2 In terms of Housing Benefit (HB) average processing times, the table below shows figures for New Claims and Changes of Circumstance:



Financial Year		End Quarter 1 2019/20 Average no. days	End Quarter 2 2019/20 Average no. days	End Quarter 2 2018/19 Average no. days	2018/19 (year outturn) Average no. days
New Claims	Lincoln	27.10	<b>23.43</b>	28.16	25.82
	North Kesteven	27.50	<b>21.59</b>	23.52	27.49
Changes of Circumstance	Lincoln	5.09	<b>5.22</b>	8.09	4.12
	North Kesteven	5.31	<b>5.20</b>	4.66	2.98

Performance for all measures is looking positive moving forward. Processes have been (and continue to be) reviewed and it is envisaged New Claims performance will continue to improve as the financial year progresses.

Universal Credit (UC) continues to have an impact on processing times due to the number of UC-related documents requiring processing. Our Benefits Service now has a reduced number of HB new claims to process (as some customers move on to UC) and some of those claims that we do receive are exempt/supported accommodation which can often take longer to gather information and process. Effectively the 'baseline' for assessing HB claims compared to 'pre-UC' rollout has potentially increased.

Positively in terms of 'direction of travel', in week-ending 6<sup>th</sup> October 2019, new claims were processed in an average of 19 and 18 days, for City of Lincoln and North Kesteven, respectively.

- 5.3 Prompt processing of claims remains vital, but of equal importance is accuracy of processing and 'getting it right, first time'. The table below the outcomes of claims checked under our quality checking regime, since the formation of the shared service:

Financial Year	End Quarter 2 2019/20	End Quarter 2 2018/19	2018/19 (year outturn)
<b>City of Lincoln</b>	95.57% <i>(345 out of 361 checked)</i>	83.91% <i>(73 out of 87 checked)</i>	86.07% <i>(210 out of 244 checked)</i>
<b>North Kesteven</b>	96.41% <i>(215 out of 223 checked)</i>	96.10% <i>(197 out of 205 checked)</i>	95.92% <i>(306 out of 319 checked)</i>

The level of performance continues to improve and is being maintained, which is particularly pleasing in light of the rollout of Universal Credit making some assessments more complex. There has continued to be concentration on checking claims more likely to be assessed incorrectly first time, - it should also be noted that even '£0.01p' is counted as financially incorrect.

In addition to these targeted checks, more checks are also carried out as part of the rolling annual subsidy claim checking regime.

## **6. Strategic Priorities**

6.1 Both City of Lincoln and North Kesteven have a number of strategic priorities. Two that have an impact on the Revenues and Benefits Service are:-

- Lincoln: “Let’s Reduce Inequality”.
- North Kesteven: “Our Community Our Economy”.

6.2 The Benefits Service plays a key role in reducing inequality by ensuring residents receive the benefits they are entitled to and providing money / debt advice. The Revenues Section is also mindful of the strategic priorities when engaging with business ratepayers as they recover business rates – and also promoting and encouraging growth in the districts. Digital Inclusion, Channel Shift / Customer Experience, Financial Inclusion and Partnership Working are all key priorities for the shared service.

## **7. Organisational Impacts**

7.1 Finance: There are no direct financial implications arising from this report.

7.2 Legal Implications including Procurement Rules: There are no direct Legal or Procurement implications arising from this report.

7.3 Equality, Diversity & Human Rights: There are no direct implications arising from this report.

## **8. Risk Implications**

8.1 A Risk Register is in place for the Revenues and Benefits shared service.

## **9. Recommendations**

9.1 Note the performance information as set out in this report.

9.2 Note that a performance update will be presented at the next meeting of this committee, on 5<sup>th</sup> February 2020.

**Is this a key decision?** Yes/No

**Do the exempt information categories apply?** Yes/No

**Does Rule 15 of the Scrutiny Procedure Rules (call-in and urgency) apply?** Yes/No

**How many appendices does the report contain?** Appendix 1: Performance Data to end Quarter 2 2019/20

**List of Background Papers:**

None

**Lead Officer:**

Martin Walmsley, Head of Shared Revenues and  
Benefits  
Telephone (01522) 873597

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**25<sup>th</sup> November 2019 Revenues and Benefits Joint Committee  
Performance Update  
Appendix 1: Performance Data to end Quarter 2 2019/20**

<b>Measure</b>	<b>End Quarter 2 2019/2020</b>		<b>End Quarter 2 2018/2019</b>		<b>2018/19 Annual Outturn</b>	
	<b>NK</b>	<b>COL</b>	<b>NK</b>	<b>COL</b>	<b>NK</b>	<b>COL</b>
<b>Local Authority</b>						
<b>Council Tax collection (cumulative)</b>	57.42%	52.87%	57.77%	52.80%	99.08%	96.76%
<b>NNDR collection (cumulative)</b>	63.00%	59.58%	63.31%	60.57%	99.42%	99.81%
<b>NNDR collection – WLDC (cumulative)</b>	58.80%		58.39%		98.63%	
<b>No. Revenues customers awaiting change to be processed</b>	571	1,177	376	766	201	437
<b>Total Net Arrears for Council Tax prior years (i.e. not including current year)</b>	£1,309,972	£3,151,392	£1,195,047	£2,759,677	£934,830	£2,252,680
<b>Total Net Arrears for NNDR prior years (i.e. not including current year)</b>	£208,238	£604,246	£146,028	£457,583	£178,580	£169,367
<b>Housing Benefit overpayments collection in period</b>	95.63%	101.25%	124.61%	105.48%	107.45%	100.38%
<b>Housing Benefit New Claims: Average number of days to process (cumulative)</b>	21.59 days	23.43 days	23.52 days	28.16 days	27.49 days	25.82 days
<b>Housing Benefits Changes of Circumstances: Average number of days to process (cumulative)</b>	5.20 days	5.22 days	4.66 days	8.09 days	2.98 days	4.12 days
<b>No. Benefits customers awaiting assessment (cumulative)</b>	283	939	471	1,520	502	897
<b>% Benefits claims checked financially correct (cumulative)</b>	96.41%	95.57%	95.92%	83.91%	95.92%	86.07%

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**SUBJECT: REVENUES AND BENEFITS - FINANCIAL MONITORING  
QUARTER 2 2019/20**

**REPORT BY: CHIEF EXECUTIVE & TOWN CLERK**

**LEAD OFFICER: MARTIN WALMSLEY, HEAD OF SHARED REVENUES AND  
BENEFITS**

## 1. Purpose of Report

- 1.1 To present to Members the second quarter's performance for the Revenues and Benefits shared service for 2019/20.

## 2. Executive Summary

- 2.1 The forecast outturn for 2019/20 predicts that there will be an underspend against the approved budget of £94,190.

## 3. Background

- 3.1 The approved budget for 2019/20 was agreed by Revenues and Benefits Joint Committee on 19<sup>th</sup> February 2019. The Committee set a budget for 2019/20 of £2,367,000 for the service, which has since been increased after receipt of New Burdens Grants, totalling £97,781.
- 3.2 The budget, as mentioned in paragraph 3.1, has subsequently been further revised for the following New Burdens Grants notified to each Authority in quarter two: -

<b>Budget adjustment</b>	<b>CoLC</b>	<b>NK</b>	<b>Total</b>
	<b>£</b>	<b>£</b>	<b>£</b>
Housing Benefits Review	839	237	1,075
UC LA Universal Support Grant Funding	11,368	4,294	15,662
<b>TOTAL</b>	<b>12,206</b>	<b>4,531</b>	<b>16,737</b>

## 4. Quarter Two Financial Performance and Forecast Outturn 2019/20

### 4.1 Performance Quarter 2

Financial performance for the first quarter of 2019/20 is detailed in Appendix 1 to this report. At quarter 2, there is an underspend against the approved budget of £26,967.

### 4.2 Forecast Outturn 2019/20

The forecast outturn for 2019/20 predicts that there will be an underspend against the approved budget of £94,190. Further detail is attached as Appendix 2 to this report.

4.3 A summary of the main forecast year-end variations against the approved budget for 2019/20 is shown below.

<u>Service Area</u>	<u>£</u>	<u>Reason for variance</u>
<b>Revenues and Benefits Management</b>		
IT Costs	13,000	Northgate System costs – budget to be realigned to reflect the actual value during 2020/21 budget setting process.
<b>Benefits</b>		
Salaries (Including Career Grades)	(50,200)	Vacant hours together with career graded posts budgeted at top of scale however not all officers are at the top of the scale.
New Burdens Grants	(26,330)	New Burdens Funding offset by specific IT costs incurred.
<b>Benefits/Money Advice</b>		
Salaries	(13,800)	Vacant staff hours.
<b>Revenues Local Taxation</b>		
Agency Spend	(20,600)	Reduction in agency spend due to improved substantive position.

## 5. Organisational Impacts

- 5.1 The financial implications are contained throughout the report.
- 5.2 There are no legal implications arising from this report.
- 5.3 There are no equality and diversity implications as a direct result of this report.

## 6. Risk Implications

- 6.1 A full financial risk assessment is included in the Council's Medium Financial Strategy.

## 7. Recommendations

- 7.1 Members are recommended to note the actual position at quarter 2.
- 7.2 Members are recommended to approve the budget adjustments for 2019/20 as per para 3.2.
- 7.3 To approve carry forward into 2020/21 projected budget underspend to extend 2.0 Full-Time Equivalent additional Council Tax Administration Officers recently appointed, for the whole of 2020/21 – approximate cost £51,934. Agreement to extension of these positions would significantly assist with tackling Council Tax performance matters, as detailed in the Performance Update report on this Committee's Agenda.



<u>Service Area</u>	<u>£</u>	<u>Reason for variance</u>
<b>Key Decision</b>		No
<b>Do the Exempt Information Categories Apply?</b>		No
<b>Call in and Urgency:</b> Is the decision one to which Rule 15 of the Scrutiny Procedure Rules apply?		No
<b>How many appendices does the report contain?</b>		Two
<b>List of Background Papers:</b>		None
<b>Lead Officer:</b>	Martin Walmsley Telephone 01522 873597	

**Appendix 1 Actual Position as at Quarter 2 2019/20**

	Profiled Budget			Actual			Variance		
	CoLC	NK	Combined	CoLC	NK	Combined	CoLC	NK	Combined
Revenues & Benefits Management	93,130	93,130	186,250	102,899	102,899	205,798	9,769	9,769	19,538
Benefits	329,040	237,860	566,900	308,292	223,246	531,537	(20,748)	(14,614)	(35,363)
Revenues Local Taxation	175,370	182,340	357,710	175,343	182,500	357,842	(27)	160	132
Money Advice	56,970	56,970	113,935	51,333	51,333	102,665	(5,637)	(5,637)	(11,275)
<b>Total Q2 2019/20</b>	<b>654,510</b>	<b>570,300</b>	<b>1,224,795</b>	<b>637,866</b>	<b>559,977</b>	<b>1,197,843</b>	<b>(16,644)</b>	<b>(10,323)</b>	<b>(26,967)</b>

## Appendix 2 Forecast Financial Outturn for 2019/20

	Annual Budget			Forecast Outturn			Variance		
	CoLC	NK	Combined	CoLC	NK	Combined	CoLC	NK	Combined
Revenues & Benefits Management	176,591	176,591	353,182	182,891	182,891	365,781	6,300	6,300	12,600
Benefits	667,466	482,511	1,149,976	616,457	445,637	1,062,094	(51,009)	(36,874)	(87,883)
Revenues Local Taxation	359,695	373,995	733,690	357,791	372,016	729,807	(1,904)	(1,979)	(3,883)
Money Advice	113,935	113,935	227,870	106,423	106,423	212,846	(7,512)	(7,512)	(15,024)
<b>Total 2019/20</b>	<b>1,317,686</b>	<b>1,147,032</b>	<b>2,464,718</b>	<b>1,263,562</b>	<b>1,106,966</b>	<b>2,370,528</b>	<b>(54,124)</b>	<b>(40,066)</b>	<b>(94,190)</b>

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**SUBJECT: WELFARE REFORM AND UNIVERSAL CREDIT UPDATE**  
**DIRECTORATE: CHIEF EXECUTIVE**  
**LEAD OFFICER: ROB KAY, WELFARE REFORM AND PROJECTS OFFICER**

**1. Purpose of Report**

1.1 To provide Joint Committee with an update regarding the national and local position of welfare reform, with a specific focus on national Universal Credit (UC) updates for this particular report.

**2. Executive Summary**

2.1 This report provides Joint Committee with an update on national Universal Credit changes; to include reference to the national statistics and national legislation changes.

The report will also provide Joint Committee with an up to date Welfare Reform action plan.

**3. Background**

3.1 Future reports will provide Joint Committee with an up to date position on the following:

- National Progress - statistics;
- National legislation changes; and
- Background Papers.

**4. National Progress – Statistics**

4.1 Latest figures published by the Department for Work and Pensions (DWP) were released on 15 October 2019, with statistics relevant to the period up to 12 September 2019.

- 2,476,704 households receiving UC (this is an increase from 2,171,997 as reported at the last meeting of this Committee)
- 809,288 were in employment. (33%) (this is an increase from 697,789 as reported at the last meeting of this Committee)

**5. Update – Private Landlord Portal**

5.1 DWP has announced that they are developing a Private Landlord Portal, whilst this is possibly better for the landlord to apply, this appears to potentially come away somewhat from the original concept of UC being paid direct to the tenant and budgeting accordingly.

## 6. Recent Universal Credit changes – Autumn 2018 budget announcement and January 2019 announcement

6.1 **Appendix 1** shows all recent announcements from the Autumn Budget 2018 and January 2019, along with updates as to how these will impact customers and the local authority.

There have been announcements regarding Severe Disability Premium (SDP) compensation scheme, SDP gateway closure and Pension increase since the last meeting of this Committee in September 2019.

The Welfare Reform Project Officer has undertaken a recent piece of work to identify those customers who are not currently in receipt of the SDP. In doing this, officers have been able to support customers in maximising their income, reviewing deductions due to under occupation and offering support due to other needs identified.

This was initially undertaken for City of Lincoln tenants (LA and Housing Association (HA)) affected by under occupation. A total of 67 residents were identified (56 LA and 11 HA), with a positive result for 14 customers income being maximised by a total of £45,358. The outcomes are detailed below: -

	Local Authority		Housing Association		Total	
	Number	Value (£)	Number	Value (£)	Number	Value (£)
Income maximised	13	£43,324	1	£2,034	<b>14</b>	<b>£45,358</b>
Awaiting outcome	10	N/A	10	N/A	20	N/A
No response	9	N/A	0	N/A	9	N/A
No financial gain	23	N/A	0	N/A	23	£0

As a result of the success of this work, officer then compiled a list of all customers who, based on our information could have been in receipt of the SDP. Officers identified 1,344 customers. Initially, letters were going to be issued to those customers, but, after the first 100 letters were issued, it was clear that a high percentage of customers would contact the team. The approach was adjusted and the Welfare Reform Support Team reviewed the remaining 1,244 customers themselves – using the DWP and Housing Benefit systems. This resulted in just 154 customers being entitled to the SDP.

Each of the 154 customers are currently being contacted by the team - asking customers to confirm details to ensure they are eligible for the SDP. Forms are being issued to the customers

## 7. Welfare Reform Strategy Action Plan

- 7.1 Progress with our shared service's 'high level' Welfare Reform Strategy Action Plan is to be monitored by Joint Committee, on a quarterly basis.

Updates on progress of this plan is provided at **Appendix 2** to this report. The action plan is fluid and flexible to respond to changes in welfare reform related priorities, changes and demands.

## **8. Update – Universal Credit Support team**

- 8.1 A Universal Credit Support update report was presented to this Committee on 6 September 2019.
- 8.2 As part of this report, a verbal update was given by the Head of Service regarding the UC Advice Review which was being undertaken at City of Lincoln. The Advice Review had been undertaken to review the UC support arrangements / advice provision and potential options going forward. The review considered the number of teams within the authority who provide support to UC customers and determined whether there was potential for joint working between the teams, and what this model could look like. These teams are the Universal Credit Support team, Welfare Advice team and Housing team.
- 8.3 The key areas the review focussed on were: -
- Mapping customer journeys;
  - Considerations if arrangements were under 'one team'; and
  - Help to claim progress.
- 8.4 The outcomes of the review are currently being considered.

## **9. Strategic Priorities**

- 9.1 **City of Lincoln: Let's drive economic growth and North Kesteven: Our economy and Our Community:** An understanding of Universal Credit and its wider impacts on City of Lincoln residents and arrears levels is important when reducing poverty and driving economic growth across the City. The aim of Universal Credit is to provide a simplified means tested benefits system, with the objective of avoiding the poverty trap, where there is a disincentive to work longer hours because of the loss of benefits and higher taxes.
- 9.2 **City of Lincoln: Let's drive economic growth and North Kesteven: Our economy and Our Community:** - A key role in reducing inequality by ensuring residents receive the benefits they are entitled to and providing money / debt advice. There are strategic priorities when engaging with those in receipt of Welfare Benefits, Digital Inclusion, Channel Shift/ Customer Experience, Financial Inclusion and Partnership Working are all key priorities as part of this report.

## **10. Organisational Impacts**

## **11. Finance**

There are no direct financial implications arising as a result of this report.

**11.1 Legal implications inc Procurement Rules:**

There are no direct Legal or Procurement implications arising from this report.

**12. Risk Implications**

12.1 The Councils bear the risk of local authority rent arrears which are not fully recovered.

**13. Recommendation**

13.1 Joint Committee notes this report – and that an update will be presented at the next meeting of this Committee on 5 February 2020.

<b>Key Decision</b>	<b>No</b>
<b>Do the Exempt Information Categories Apply</b>	No
<b>Call In and Urgency:</b> Is the decision one to which Rule 15 of the Scrutiny Procedure Rules apply?	No
<b>Does the report contain Appendices?</b>	Yes
<b>If Yes, how many Appendices?</b>	Appendix 1: Universal Credit Changes – 2019 Appendix 2: Welfare Reform Action Plan
<b>List of Background Papers:</b>	No
<b>Lead Officer:</b>	Rob Kay, Welfare Reform and Projects Officer, Telephone 01522 873767



**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update  
October 2019**

<b>Autumn Budget 2018</b>		
<b>Update</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
<b>Universal Support</b>	<p><b>Universal Support</b> currently helps with digital support, such as using a computer to make or maintain their claim, and assistance in budgeting and managing their finances.</p> <p>DWP will enter into a new partnership with Citizens Advice immediately, and they will run their developing service alongside local authorities until 31 March 2019, when Citizens Advice will deliver the full service solely from April 2019.</p> <p>DWP will provide £39 million of funding from April 2019 to Citizens Advice and Citizens Advice Scotland to provide this service. DWP will fund Citizens Advice and Citizens Advice Scotland a further £12 million to set up delivery in the run up to April 2019 to ensure a smooth transition to the new delivery model. This funding is from Universal Support's £200 million budget, which was launched in 2015.</p> <p>There is still a great deal of clarity still required regarding how this arrangement may work, what the exact scope is, and what local authorities' role may be, with concerns as to how this model may operate and whether or not it will match the holistic service to UC customers currently being provided by our shared service to residents of Lincoln and North Kesteven.</p>	<b>October 2019: Verbal Update will be provided at this Committee</b>

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

<b>Autumn Budget 2018</b>		
<b>Update</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
<b>Universal Credit and Supported Housing</b>	<p>Consultation on a new way of providing funding for supporting housing and a “sheltered rent” closed earlier this year. The new arrangements were intended to start next year and this would have reduced drastically the number of Housing Benefit claims (including for those of pension age). Instead, ring fenced funding would have been provided to local authorities to provide support for these customers.</p> <p>On 9<sup>th</sup> August 2018, Government announced that all these plans have been dropped and that local authorities will therefore be maintaining Housing Benefit for all supported housing, including short-term. This reflects the particular needs of these vulnerable groups of people, and the government’s commitment to protect them. The plans to introduce a sheltered rent have also gone.</p>	
<b>Universal Credit Work Allowance increase</b>	<p>The Budget provides additional support for people transferring onto Universal Credit, and an increase in the Work Allowance that will mean 2.4 million households keep more of their income.</p> <p>The work allowance is the amount that households with children, and people with disabilities can earn before their Universal Credit award begins to be withdrawn.</p>	<p><b>October 2019: No new update since last Committee</b></p> <p>August 2019: No new update since last Committee</p> <p>The Work Allowance will be increased by £1,000 from April 2019. This means that 2.4 million households will keep an extra £630 of income each year.</p>

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

<b>Autumn Budget 2018</b>		
<b>Update</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
		<p>Higher work allowance = £503pcm Lower work allowance = £287pcm</p> <p>However if you are a worker who has no children or you or your partner have not been assessed as having limited capability for work, you will still not receive help in the form of work allowances.</p> <p>The allowance will result in customers who are entitled to it will be better off by £1000 per year.</p>
<b>Extra help for households moving onto Universal Credit</b>	<p>The government has listened to representations made by stakeholders on Universal Credit, and the Budget announces an extensive package of extra support for claimants as they make the transition to Universal Credit.</p> <p>Building on the Autumn Budget 2017 announcement that Housing Benefit claimants will receive an additional payment providing a fortnight's worth of support during their transition to Universal Credit, the government will extend this provision to cover the income-related elements of Jobseeker's Allowance and Employment and Support Allowance, and Income Support. This will be effective from July 2020, and benefit around 1.1 million claimants.</p> <p>To support the transition to Universal Credit for all self-employed people, the government is also extending the</p>	<p><b>October 2019: No new update since last Committee</b></p> <p>August 2019: No new update since last Committee</p> <p>2 week run on for JSA, ESA and IS customers</p> <p>These means those who are migrated to UC from July 2020 will receive 2 weeks of HB, 2 weeks of either JSA/IS or ESA and 2 weeks of UC, which adds further financial security to dealing with moving to monthly payments and lessens the need for advanced loans and threat of eviction/court.</p>

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

<b>Autumn Budget 2018</b>		
<b>Update</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
	<p>12-month grace period (the period before the Minimum Income Floor applies) to all gainfully self-employed people; giving claimants time to grow their businesses to a sustainable level. This will be introduced from July 2019 and implemented fully from September 2020.</p> <p>From October 2019, the government will reduce the maximum rate at which deductions can be made from a Universal Credit award from 40% to 30% of the standard allowance. This will ensure that those on Universal Credit are supported to repay debts in a more sustainable and manageable way. From October 2021, the government will also increase the period over which advances will be recovered, from 12 to 16 months.</p>	<p>By reducing the maximum amount that deductions can be made and extended the repayments, this will reduce hardship.</p>
<b>Funding previously announced measures</b>	<p><b>for</b> In addition, the Budget provides funding for the announcements made by the Secretary of State for Work and Pensions in April and June 2018 to support the roll-out of Universal Credit. This provided additional protections for welfare claimants, including: enhancements to transitional protection for people moving onto Universal Credit; extending existing support for non-parental carers and adopters in tax credits and Universal Credit; and enhanced protections for those currently receiving the Severe Disability Premium to provide additional support as Universal Credit is implemented.</p>	<p><b>October 2019: No new update since last Committee</b></p> <p>August 2019: No new update since last committee</p>

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

<b>Autumn Budget 2018</b>		
<b>Update</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
	<p>The government will deliver these changes slowly and carefully. In response to feedback on Universal Credit, the implementation schedule has been updated: it will begin in July 2019, as planned, but will end in December 2023. The scope of the surplus earnings policy in Universal Credit will also be temporarily reduced: it will continue to affect large earnings spikes (above £2,500) until April 2020, when it will revert to affecting earnings spikes of £300.</p>	
<p><b>Support for 18 to 21 year olds and supported Housing</b></p>	<p>In the Autumn Budget 2017, Ministers have reversed a 2014 move stopping individuals under the age of 21 automatically being entitled to Universal Credit housing costs. This decision has not yet been passed through legislation, and it is likely this will not take place in Autumn 2018 as the legislation has been delayed by 6 months.</p> <p>As a result, currently, 18 to 21 year olds are not eligible for support towards their housing costs, unless they are classed as vulnerable (as defined by DWP). Around 90% of 18-21 year olds are in these categories.</p> <p>The DWP provides a programme of intensive support for all 18 to 21 year olds making a new claim to Universal Credit. This programme is being rolled-out in line with the roll-out schedule for Universal Credit. It aims to encourage and support all young people into employment, work-related training or an apprenticeship,</p>	<p><b>October 2019: No new update since last Committee</b></p> <p>August 2019: No new update since last Committee</p> <p>From 31/12/2018 there is no longer any conditionality attached to 18-21 year olds to get help with housing Costs, any tenant that was previously tuned down help with Housing Costs will automatically be awarded from their assessment period following 31/12/2018.</p> <p>Allows those 18-21 to have the rent element paid, they will still be subject to the intensive work scheme (providing they are not exempt) and will allow them to look to enter the labour market with the correct support, whilst being able to live in a stable environment.</p>

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

<b>Autumn Budget 2018</b>		
<b>Update</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
	including a programme of intensive support that is tailored to the individuals' needs and job goals. If the individual is attending training or work experience, travel and childcare costs may also be reimbursed.	

<b>January 2019</b>			
<b>Update</b>	<b>Effective Date</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
<b>Severe Disability Premium and Universal Credit</b>	<b>January 2019</b>	<p>Claimants receiving the Severe Disability Premium (SDP) in a legacy benefit will not be able to move on to Universal Credit for the foreseeable future.</p> <p>The SDP is an amount paid to severely disabled people as part of the following legacy benefits:</p> <ul style="list-style-type: none"> <li>• JSA(IB)</li> <li>• ESA(IR)</li> <li>• IS</li> <li>• HB</li> </ul> <p>These claimants also need to be in receipt of one of the following disability benefits, and live alone (or be classed as living alone) and no one must be in receipt of Carer's Allowance (CA) or</p>	<p><b>October 2019: The 'transitional payments' will comprise of:</b></p> <p><b>an ongoing monthly payment to those who are eligible for it; and</b></p> <p><b>an additional lump-sum payment to cover the period since they moved to UC.</b></p> <p><b>The monthly 'transitional payments' reflect the amount of SDP that a claimant was receiving prior to migration, and are a flat rate of:</b></p> <p><b>£285 a month for claimants not in the UC limited capability for work related activity (LCWRA) group (the broad monthly equivalent of the lower rate SDP at £65.85 a week) £120 a month where the UC claimant has been determined as having LCWRA, and who therefore already receives an additional amount in their UC award because of their</b></p>

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

January 2019			
Update	Effective Date	Details	Update for 25 November 2019
		<p>the UC Carer Element for caring for them:</p> <ul style="list-style-type: none"> <li>• Disability Living Allowance (DLA) care component at the middle or higher rate</li> <li>• Personal Independence Payment (PIP) daily living component at the standard or enhance rate</li> <li>• Attendance Allowance or Constant Attendance Allowance</li> <li>• Armed Forces Independence Payment (AFIP).</li> </ul> <p>If the claimants are in a couple, they get the higher amount of severe disability premium if the claimant and partner are eligible.</p> <p>Claimants who receive a legacy benefit which includes the SDP, will no longer receive SDP or any other premium once they make a claim to UC. These premiums are not payable under UC regulations.</p>	<p><b>health condition. The higher rate of the LCWRA component is taken into account against the extra payments offered by the transitional protection £405 a month where joint claimants were receiving the higher couple rate SDP in their existing benefits £285 a month where joint claimants were receiving the lower couple rate SDP and are not receiving the LCWRA component in UC £120 a month where joint claimants were receiving the lower couple rate SDP and are receiving the LCWRA component in UC</b></p> <p>August 2019: The Universal Support team are currently reviewing cases who may be eligible for an SDP. All customers with Disability Living Allowance (DLA) Care and Personal Independence Allowance (PIP) will have a review where there is a deduction for under occupation. The team will look to reduce this through increasing the carers allowance within the claim calculation or Discretionary Housing Payment. There are 188 Lincoln tenants who are in receipt of either DLA or PIP – Officers are currently reviewing the best way to proceed with these cases.</p>

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

January 2019			
Update	Effective Date	Details	Update for 25 November 2019
			<p>By retaining those with SDP under HB this allows for them to continue to receive disability premiums, which there are currently none under UC.</p> <p>Those that have already moved over before the regulations changed will be given backdated “compensation” payments as a transitional payment”.</p>
<b>Universal Credit Two-child Limit</b>	<b>1 February 2019</b>	<p>Families with more than two children who make new claims for Universal Credit will no longer be directed to claim Child Tax Credit.</p> <p>The two child limit will not apply to those families.</p> <p>Those who have been awarded Universal Credit after April 2017 and have two or fewer children but who then have a third or subsequent child will have the two-child limit applied.</p>	<p><b>October 2019: No new update since last Committee</b></p> <p>August 2019: No new update since last Committee</p> <p>Those that have more than 2 children before April 2017 will get the child element under UC for all children, if a subsequent child is born after April 2017 they will not get the child element for this child.</p> <p>Those who have a 3<sup>rd</sup> child after April 2017 will not get the child element for this child (they would still be entitled to any disabled elements).</p> <p>Those with more than 2 children, who get the child element will in most cases be subject to the</p>



**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

<b>January 2019</b>			
<b>Update</b>	<b>Effective Date</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
			Benefit Cap of £20,000, which in most cases will then not make then any better off financially.
<b>Pension Credit Child allowances</b>	<b>1 February 2019</b>	People of Pension Credit age who are responsible for a dependent child or children, will receive help with the child or children in the form of dependent allowances paid within their Pension Credit award. This is because you will no longer be able to make a new claim for Tax Credits (Child Tax Credit or Working Tax Credit) if you are Pension Credit age.	<b>October 2019: No new update since last Committee</b>  August 2019: No new update since last Committee
<b>Universal Credit Work Allowance Increases</b>	<b>April 2019</b>	Work allowances are the amount of your earnings from employment that you are allowed to keep before it is taken into account as income for Universal Credit. These will increase by £1000 for the year, meaning that people in work who have children or have limited capability for work (or their partner has limited capability for work) will benefit by up to £630 per year.	<b>October 2019: No new update since last Committee</b>  August 2019: No new update since last Committee
<b>National Minimum Wage Increase</b>	<b>April 2019</b>	The National Living Wage will increase by 4.9% from £7.83per hour to £8.21 per hour in April 2019.	<b>October 2019: No new update since last Committee</b>

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

<b>January 2019</b>			
<b>Update</b>	<b>Effective Date</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
		The National Minimum Wage increases from £7.38 per hour to £7.70 per hour for people aged 21 to 24; and from £5.90per hour to £6.15per hour for people aged 18 to 20.	<b>October 2019: No new update since last Committee</b>
<b>Universal Credit and Mixed Aged Couples</b>	<b>16 May 2019</b>	<p>From 15 May 2019, mixed age couples (where one party of the couple is over Pension Credit qualifying age and the other under that age) will no longer be able to choose whether they claim Universal Credit or Pension Credit or pension age Housing Benefit. Both parties of a couple will have to reach the Pension Credit qualifying age before they can be entitled to Pension Credit and/or pension age Housing Benefit.</p> <p><b>Protections</b> There is a protection for existing mixed age couples as though the changes had not come into force. This means that where a mixed age couple were entitled to the following on 14 May 2019, they will continue to be entitled on or after 15 May 2019:</p>	<p><b>October 2019: No new update since last Committee</b></p> <p>August 2019: No new update since last Committee</p>

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

January 2019			
Update	Effective Date	Details	Update for 25 November 2019
		<ul style="list-style-type: none"> <li>• Pension age Housing Benefit</li> <li>• Pension Credit or</li> <li>• Both.</li> </ul> <p>The protection will cease for the working age member of the couple, on any day on or after 15 May 2019, when that person is not entitled to either pension age Housing Benefit or Pension Credit as a part of the same mixed age couple.</p> <p><b>Single Pensioner forms a partnership</b>                      If a single pensioner forms a couple with a person below the qualifying age on or after 15 May 2019, entitlement to pension age Housing Benefit and Pension Credit will end.</p> <p><b>Approaching mixed age:</b>                      Couples who are under State Pension age and have an award of HB assessed under the Housing Benefit Regulations 2006 (SI 2006/213), ‘working age HB’, will become a mixed age couple once one member reaches pension age.</p>	

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

<b>January 2019</b>			
<b>Update</b>	<b>Effective Date</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
		<p>At this point rather than re-assessing the claim under the Housing Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006 (SI 2006/214) 'pension age HB', the couple should be advised that they need to claim Universal Credit (UC). The relevant provision is Article 6(2)(b) and (3)(a) of SI 2019/37.</p> <p>Where the younger partner is in receipt of Income Support (IS), Jobseeker's Allowance (income-based) (JSA(IB)), Employment and Support Allowance (income-related) (ESA(IR)), the couple will not be required to claim UC and can continue to receive working age HB if they have an existing claim until there is a relevant change in their circumstances which ends entitlement to those benefits. They will have to claim UC if they need further help with their housing costs.</p>	
<b>Managed Migration</b>	<b>July 2019</b>	The current plan in Great Britain is that DWP will begin testing the managed	<b>October 2019: No new update since last Committee</b>

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

<b>January 2019</b>			
<b>Update</b>	<b>Effective Date</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
		<p>migration process from July 2019 to July 2020 through a pilot in Harrogate.</p> <p>During this period, up to 10,000 existing legacy benefit claimants (including some tax credit claimants) will be moved across to UC through the new process.</p> <p>Benefit claimants in Harrogate in North Yorkshire will be the first to be transferred to Universal Credit by managed migration under a pilot scheme for 12 months. Transitional protection will be available to those taking part in the pilot. Only once the pilot scheme has been completed and assessed, claimants will be moved over to Universal Credit in greater numbers.</p>	<p>August 2019: The Universal Support team will monitor the process and outcomes of the managed migration.</p>
<b>Self-employed minimum income floor grace period</b>	<b>July 2019</b>	<p>Self-employed people whose earnings are low, may have their Universal Credit worked out on higher earnings than they have. This is called the Minimum Income Floor (35hours per week x £8.21(NLW) x 52 weeks/12</p>	<p><b>October 2019: No new update since last Committee</b></p> <p>August 2019: No new update since last Committee</p>

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

<b>January 2019</b>			
<b>Update</b>	<b>Effective Date</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
		<p>months). If the business has started within the last 12 months the minimum income floor does not affect the entitlement for the first 12 months of the Universal Credit claim. The government have announced that they will extend this 12-month ‘grace period’ to all people who are gainfully self-employed.</p> <p>However, this will only apply to people who have been transferred over to Universal Credit by managed migration from July 2019 at the earliest. Self-employed people who make a new Universal Credit claim or have a change of circumstance which moves them on to Universal Credit, will not benefit from this change until September 2020.</p>	
<b>Universal Credit Advance Recovery Reduction</b>	<b>October 2019</b>	From October 2019, the maximum rate at which deductions can be made from Universal Credit, to repay an advance payment, will be reduced from 40% to 30% of the standard allowance of Universal Credit.	<p><b>October 2019: No new update since last Committee</b></p> <p>August 2019: No new update since last Committee</p>

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

<b>January 2019</b>			
<b>Update</b>	<b>Effective Date</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
		The period over which advances can be recovered will be extended from 12 to 16 months, from October 2021.	
<b>Parental Bereavement leave and pay</b>	<b>April 2020</b>	The government will introduce a new legal entitlement to two weeks' leave for employees who suffer the death of a child under 18, or a stillbirth after 24 weeks of pregnancy. Employed parents will also be able to claim pay for this period if they meet the qualifying conditions. However, we are awaiting further announcements on what the qualifying criteria is going to be.	<b>October 2019: No new update since last Committee</b>  August 2019: No new update since last Committee
<b>New update: State pension to rise at least 4%</b>	<b>April 2020</b>	Millions of pensioners will receive at least a 4% pay rise next year, in line with annual wage growth – the biggest increase since 2012.  Pensioners would see their payments rise by up to £351 a year.  The state pension is protected by the 'triple lock', which means it increases each April by the greater of price inflation, earnings growth or 2.5%.	<b>October 2019: This is a new update</b>

**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

<b>January 2019</b>			
<b>Update</b>	<b>Effective Date</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
		While September's inflation figures are yet to be released, pensioners are currently on track to earn a 4% bump in line with workers for the second year running.	
<b>Removal of free TV Licence</b>	<b>June 2020</b>	The free TV licence will no longer be available to all people 75 or over. From 1 June 2020 the criteria will be aged 75 or over and getting Pension Credit in order to qualify for the free licence.	<b>October 2019:</b>  August 2019: No new update since last Committee
<b>2 weeks transitional payment for passported incomes</b>	<b>July 2020</b>	Claimants will receive an additional fortnight's worth of Income-based Jobseekers' Allowance, Income-related Employment and Support Allowance or Income Support if they are on one of these benefits when they move over to Universal Credit	<b>October 2019:</b>  August 2019: No new update since last Committee
<b>Self-employed Minimum Income Floor Grace Period</b>	<b>September 2020</b>	Available to everyone	<b>October 2019:</b>  August 2019: No new update since last Committee
<b>New update:</b>	<b>January 2021</b>	The new regulations abolish, from January 2021, the SDP Gateway that	<b>October 2019: This is a new update</b>



**APPENDIX 1: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

<b>January 2019</b>			
<b>Update</b>	<b>Effective Date</b>	<b>Details</b>	<b>Update for 25 November 2019</b>
<b>Close Gateway</b> <b>SDP</b>		<p>prevents claimants entitled to the SDP from making a claim to UC if they have a relevant change of circumstances.</p> <p>Once the Gateway is removed claimants will move to UC if they have a relevant change of circumstances and may be eligible to be considered for transitional payments.</p>	

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**APPENDIX 2: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

Ref.	Action	Responsible Officer/ Organisation	Target Date	Comments/ Updates
WR3	Analysis of any shared service staff training and development needs, identification of transferrable skills	Head of Shared Revenues and Benefits	Ongoing throughout 2019/20	<p><b>October 2019: No change to update since last meeting of this Committee.</b></p> <p>August 2019: Ongoing – UC changes are being included within staff training and quality checks are undertaken for UC assessments.</p> <p>Update May 2019: Outcome of 2018/19 UC Support has been reviewed. North Kesteven have retained UC Support Officer for 2019/20 and 2020/21. City of Lincoln are currently reviewing the level of support.</p>
WR4	Assess impacts of COL/NK funding changes regarding national UC rollout	Head of Shared Revenues and Benefits	Ongoing	<p><b>October 2019: No change to update since last meeting of this Committee.</b></p> <p>August 2019: No update since last meeting of this Committee.</p> <p>UC funding for Local Authorities ceased on 31 March 2019 with funding being transferred to Citizens Advice for Help to Claim.</p> <p>LA's still receive DWP funding for other areas relating to UC. Currently a total of £68,562 funding has been received for new burdens and mixed age couples: -</p>

**APPENDIX 2: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

Ref.	Action	Responsible Officer/ Organisation	Target Date	Comments/ Updates
				<ul style="list-style-type: none"> <li>• City of Lincoln = £47,478</li> <li>• North Kesteven = £21,084</li> </ul>
WR11	Training delivery plan for UC and USDL to be formulated	Revenues and Benefits Manager	Ongoing throughout 2019/20	<p><b>October 2019: No change to update since last meeting of this Committee.</b></p> <p>August 2019: Ongoing – UC changes are being included within staff training and quality checks are undertaken for UC assessments. All shared service staff have Universal Credit training with assessment guides. UC Support team have a detailed understanding of legislation and the impacts this has on customers.</p> <p>Training is delivered as and when new legislation is announced.</p>
WR13	Other opportunities for co-location to support USDL work identified	Head of Shared Revenues and Benefits	Ongoing throughout 2019/20	<p><b>October 2019: CA co-location undertaken at NK and this has worked well.</b></p> <p>August 2019: Citizens Advice is undertaking Help to Claim from their office. For NK, co-location will be trialled from 2 September for 8 weeks</p> <p>Potential for co-location of Lincoln Citizens Advice at City Hall, particularly due to the Help to Claim process and close link needed to Lincoln teams.</p>

**APPENDIX 2: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update  
October 2019**

Ref.	Action	Responsible Officer/ Organisation	Target Date	Comments/ Updates
WR15	Invest to Save monthly monitoring	Revenues and Benefits Manager	Ongoing	<p><b>October 2019: HB Overpayment report to this committee has now ceased as work has become ‘business as usual’</b></p> <p>August 2019: Separate report as part of this committee with regards to HB Overpayments.</p> <p>Housing Benefit Overpayment Project – reduction in overpayments for 2018/19 of £676,968: -</p> <ul style="list-style-type: none"> <li>• City of Lincoln = £463,353</li> <li>• North Kesteven = £213,615</li> </ul> <p>August 2019: No update since last meeting of this committee</p> <p>Single Person Discount Review – Bulk review to be undertaken from April to August 2020. Tender process to be undertaken for monthly reviews from September 2020 onwards.</p>
WR17	Quarterly updates to Revenues and Benefits Joint Committee on welfare reform strategy progress	Revenues and Benefits Manager	Quarterly throughout 2019/20	<p><b>October 2019: 25 November 2019 Joint Committee meeting</b></p> <p>6 September 2019 Joint Committee meeting.</p> <p>3 June 2019 Joint Committee meeting</p>

**APPENDIX 2: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

Ref.	Action	Responsible Officer/ Organisation	Target Date	Comments/ Updates
WR28	Review of DHP procedures for COL + NK for 2019/20	Benefits Team Leader (Lincoln)	Ongoing through 2019/20	<p><b>October 2019: DHP process and policy will be reviewed in readiness for 2020/21</b></p> <p>August 2019: No update since last meeting of this Committee.</p> <p>DHP process is reviewed regularly as part of monthly DHP meetings. Full review is undertaken annually.</p>
WR29	Monthly monitoring of 2019/20 Council Tax Support Schemes COL + NK	Revenues and Benefits Manager	Ongoing through 2019/20	<p><b>October 2019: No change to update since last meeting of this Committee.</b></p> <p>August 2019: No update since last meeting of this Committee.</p> <p>Ongoing through taxbase: No concerns currently. Reduction in caseload each month as a result of UC and less generous scheme.</p>
WR31	Assessment of options for 2020/21 Council Tax Support Schemes COL+NK – including links into UC such as banding	Revenues and Benefits Manager	End July 2019	<p><b>October 2019: 2020/21 CTS Scheme options have been modelled and are currently out for consultation. Consultation dates are: -</b></p> <ul style="list-style-type: none"> <li>• COL scheme is 30.10.19 to 11.12.19</li> <li>• NK scheme is 21.10.19 to 22.11.19</li> </ul>

**APPENDIX 2: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

Ref.	Action	Responsible Officer/ Organisation	Target Date	Comments/ Updates
				<p>August 2019: No update since last meeting of this Committee.</p> <p>Modelling for 2020/21 scheme to start in June 2019</p> <p>Committee timetable to begin in August 2019 with public consultation. Final scheme decision by January 2020</p>
WR32	Produce annual COL/NK welfare reform report	Revenues and Benefits Manager	November 2019	<p><b>October 2019: No change to update since last meeting of this Committee.</b></p> <p>August 2019: No update since last meeting of this Committee.</p> <p>Report to be produced and brought to this Committee</p>
WR33 Vision 2020	Preparing for Universal Support group to meet between COL and NK (working with partners as required)	Revenues and Benefits Manager as part of Vision 2020	Ongoing through 2019/20	<p><b>October 2019: No change to update since last meeting of this Committee.</b></p> <p>August 2019: No update since last meeting of this Committee.</p> <p>Monthly meetings arranged for 2019/20 between COL and NK</p>

**APPENDIX 2: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update October 2019**

Ref.	Action	Responsible Officer/ Organisation	Target Date	Comments/ Updates
WR34 Vision 2020	Further Support for residents to adapt to welfare reform	Revenues and Benefits Manager	Ongoing throughout 2019/20 and beyond	<p><b>October 2019: No change to update since last meeting of this Committee.</b></p> <p>August 2019: Welfare Reform and Project Officer has been tasked with looking at ways the team can support customers to reduce inequality. This is included on the project leads 1-1 and will be fed back to Lincoln Reducing Inequality Vision Group meeting in September 2019.</p> <p>Welfare Reform report and Universal Credit report which is brought to this Committee provides updates</p>
WR35 Vision 2020	Maintaining support for people moving to Universal Credit	Revenues and Benefits Manager	Ongoing throughout 2019/20 and beyond	<p><b>October 2019: UC advice review update to be provided verbally to this committee.</b></p> <p>August 2019: UC Advice review currently being undertaken.</p> <p>Welfare Reform report and Universal Credit report which is brought to this Committee provides updates</p>
WR36	Analyse potential impacts of key welfare reform announcements from Budgets in 2017	Revenues and Benefits Manager	Ongoing throughout 2019/20 and beyond	<p><b>October 2019: No change to update since last meeting of this Committee.</b></p> <p>August 2019: Welfare Reform and Project Officer has been tasked with looking at ways the team can support customers to reduce inequality. This is included on the</p>



**APPENDIX 2: 25 November 2019 - Revenues and Benefits Joint Committee – Welfare Reform Strategy Action Plan update  
October 2019**

Ref.	Action	Responsible Officer/ Organisation	Target Date	Comments/ Updates
				<p>project leads 1-1 and will be fed back to Lincoln Reducing Inequality Vision Group meeting in September 2019.</p> <p>Welfare Reform report and Universal Credit report which is brought to this Committee provides updates</p>

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**SUBJECT: BUSINESS RATES UPDATE**

**DIRECTORATE: CHIEF EXECUTIVE**

**REPORT AUTHOR: CLAIRE MOSES, REVENUES AND BENEFITS MANAGER**

**1. Purpose of Report**

1.1 To provide Joint Committee with an update on current issues within non-domestic rate.

**2. Executive Summary**

2.1 This report provides Joint Committee with an update on non-domestic rate to include reference to City of Lincoln Council and North Kesteven District Council together with West Lindsey District Council. The report is not intended to include non-domestic rate issues (for example, performance matters) covered in another report before the Joint Committee.

**3. Background**

3.1 The report brought to the last meeting of the Operational Board provided Members with an update on the following non-domestic rate issues:-

- Business Rates Pilot;
- Spring Budget 2017;
- Discretionary Relief Policy; and
- Local Government Finance Bill 2017.

3.2 Focus for both Government and billing authorities since the last meeting of Joint Committee has been on implementing the measures announced by the Chancellor in the Autumn Budget in October 2018, which have impacted on funding for reliefs during 2019/20 to 2020/21. The latest position on these previous reliefs are covered in this report.

Additional updates are provided in this report and will update on the following non-domestic rate issues: -

- Autumn Budget 2018 budget 2019; and
- City of Lincoln Business Rates Growth Policy awards.

#### 4. Spring Budget 2017

There were a number of reliefs announced in the Spring Budget 2017 which are still ongoing, and provide challenges for officers to ensure relevant businesses are in receipt of all reliefs available to them.

##### 4.1 Supporting Small Business Relief Scheme – 2017/18 to 2020/21

This relief was made available to those ratepayers who faced a large increase as a result of the loss of small business or rural rate relief. The transitional relief scheme does not provide support in respect of changes in reliefs. Therefore, those ratepayers who lost some or all of their small business or rural rate relief, may have faced very large percentage increases in bills from 1 April 2017.

To support these ratepayers, the Supporting Small Businesses Relief Scheme ensured that the increase per year in the bills of these ratepayers is limited to the greater of:-

- A percentage increase p.a. of 5%, 7.5%, 10%, 15% and 15% from 2017/18 to 2020/21; all plus inflation. Unlike the transitional relief scheme, for the first year of the scheme, the percentage increase is taken against the bill for 31 March 2017 after small business rate relief or rural rate relief; or
- A cash value of £600 per year (£50.00 per month). The cash minimum increase ensures that those ratepayers paying nothing or very small amounts in 2016/17 after small business rate relief are brought in to paying something.

Billing authorities were expected to use their discretionary powers under Section 47 Local Government Finance Act 1988 to grant the relief. In doing so, they will be compensated for the cost of granting the relief through a Section 31 grant from Government.

The number of hereditaments that have been identified for 2018/19 and 2019/20 and have benefitted from the scheme as at 30 April 2019 for each of the three authorities, is as follows:-

##### **Loss of small business relief – 2018/19**

<b>Authority</b>	<b>No. identified</b>	<b>No responded</b>	<b>Total award</b>
City of Lincoln	8	5	£6,473
North Kesteven	23	17	£23,684
West Lindsey	26	15	£19,926

##### **Loss of small business relief – 2019/20**

<b>Authority</b>	<b>No. identified</b>	<b>No responded</b>	<b>Total award</b>	<b>Comments</b>
City of Lincoln	8	4	£6,758	No change to figures
North Kesteven	23	15	£24,092	

West Lindsey	26	13	£24,487	since last committee
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Once this relief had been announced, officers manually adjusted accounts – this has ensured those ratepayers who faced large increases as a result of the loss of small business or rural rate relief, are not left waiting for relief to be awarded. This is a mandatory relief for which the local authority is compensated for.

Officers have noted that although the number of businesses awarded relief has reduced, the total award has increased. This is due to the increase in rateable value for 2019/20 – as a result of the annual uprating and reduction of transitional relief in year.

#### 4.2 **Discretionary Relief Scheme**

A £300m discretionary fund over four years from 2017/18 through to 2020/21, to support those businesses that faced the steepest increases in their business rate bills as a result of the recent revaluation, has been established. The intention is that every billing authority is provided with a share of the £300 million to support their local businesses. Billing authorities are expected to use their share of the funding to develop their own discretionary relief schemes to deliver targeted support to the most hard-pressed ratepayers.

The £300m covers the four years from 2017/18; the proposed breakdown being:-

- £175m in 2017/18
- £85m in 2018/19
- £35m in 2019/20
- £5m in 2020/21

#### **2019/20 Scheme**

Letters were sent to the Chief Financial Officers of each Billing Authority on 28 April 2017 to confirm the grant distributions, and for 2019/20 the grant distributions for the three authorities, is as follows:-

- City of Lincoln Council: £40,000
- North Kesteven DC: £37,000
- West Lindsey DC: £31,000

It had been proposed that the agreed Option for 2017/18 be applied to future years but with lower amounts to be used in the 'award column'. It had also previously been agreed for the decision regarding the proposed scheme for 2019/20 to be delegated to Chief Finance Officers for a final decision.

During April 2019, Officers have identified those ratepayers that may be entitled to relief and calculated the cost of relief for all businesses affected by the revaluation, whereby the 2019/20 charge has increased as a result.

Relief has been awarded to all accounts identified and ratepayers have been issued with a decision notice and letter of explanation.

In doing this, ratepayers can declare whether any relief awarded would not exceed the state aid limit.

### **New Discretionary Relief Scheme – 2017/18 to 2019/20 comparison:**

The table below shows the number of accounts identified and the total cost of relief for all 3 years for comparison purposes.

<b>Authority – City of Lincoln</b>	<b>No. identified</b>	<b>Total awards made</b>	<b>Budget</b>	<b>Total award (£)</b>	<b>Current not spent (£)</b>
2017/18	675	413	£198,000	£196,125	£1,875
2018/19	366	359	£96,000	£95,864	£136
2019/20	359	311	£40,000	£37,299*	£2,701

\*There has been a small reduction of £137 due to a change in rateable value for one of the businesses in receipt of this relief

<b>Authority – North Kesteven</b>	<b>No. identified</b>	<b>Total awards made</b>	<b>Budget</b>	<b>Total award (£)</b>	<b>Current not spent (£)</b>
2017/18	540	339	£186,000	£184,430	£1,570
2018/19	278	262	£91,000	£90,816	£184
2019/20	262	86	£37,000	£25,617*	£11,383

\*There has been a reduction of £1,251 as one business is no longer entitled to this relief due to closure of the business.

<b>Authority – West Lindsey</b>	<b>No. identified</b>	<b>Total awards made</b>	<b>Budget</b>	<b>Total award (£)</b>	<b>Current not spent (£)</b>
2017/18	329	217	£158,000	£102,084	£55,916
2018/19	197	176	£76,000	£75,551	£449
2019/20	176	159	£31,000	£24,891	£6,109

\*There has been a small reduction of £25 due to a change in rateable value for

one of the businesses in receipt of this relief

#### **Review of 2019/20 awards:**

A review of the awards for 2019/20 will take place in November 2019. The initial banding scheme will be adjusted to allow for further relief to be awarded. The adjusted scheme will be issued to Chief Finance Officers for delegated authorisation. The relief will be awarded onto accounts before new bills are issued for 2020/21.

This is a discretionary relief for which the local authority is compensated for.

#### **4.3 Retail Discount – Autumn budget 2018**

The Autumn Budget 2018 was announced on 29<sup>th</sup> October 2018. One of those announcements affecting Business Rates was regarding high streets.

It was recognised that High streets and town centres are crucial parts of communities and local economies, but the government recognises the challenges they face from changing consumer behaviour and is taking action to help them to evolve. High street businesses are already benefitting from recent reforms and reductions to business rates announced since Budget 2016 worth more than £12 billion over the next five years. To provide upfront support through the business rates system, the government is cutting bills by one-third for retail properties with a rateable value below £51,000, benefiting up to 90% of retail properties, for 2 years from April 2019, subject to state aid limits.

With regards to the High Streets, Retail Guidance was issued in November 2018. The guidance confirmed this measure was for 2019/20 and 2020/21 only. Eligibility criteria has been provided and local authorities will be reimbursed using a grant under section 31 of the Local Government Act 2003.

Retail discount has been awarded for 2019/20 as follows: -

#### **Retail relief – 2019/20**

<b>Authority</b>	<b>No. identified</b>	<b>No responded</b>	<b>Total award</b>	<b>Comments</b>
City of Lincoln	703	352	£893,060	Increase of 15 awards
North Kesteven	240	135	£306,473	Increase of 15 awards
West Lindsey	212	79	£185,491	Increase of 5 awards

This is a discretionary relief for which the local authority is compensated for.

#### **5. Recent Court of Appeal Decision – ATM's**

5.1 In 2013 a decision was taken by the Valuation Office Agency (VOA) for ATMs built into the front of a shop or petrol station to have a separate business rates bill. This

ruling was upheld in 2017. As a result, cash machines were brought into the Valuation Rating List. This was further appealed by large chain Supermarkets.

- 5.2 On 9 November 2018, large chain Supermarkets had their appeal heard by the Court of Appeal. The case was won and the result of the hearing is that cash machines will no longer be given separate business rates bills.
- 5.3 The Valuation Office Agency was refused leave to appeal, though they could petition the Supreme Court to hear the case.
- 5.4 On 10 December 2018, the Valuation Office Agency submitted an application for the right of appeal to the Court of Appeals ruling. Information received by Officers indicated the Supreme Court may take up until June 2019 to decide whether to hear the case, adding then a further 18 months to 2 years before a further decision is made.
- 5.5 This continues to have implications for local authorities as the ATM's are now included as an appeal threat, and provision will need to be made for potential refunds.

### City of Lincoln

<b>Business</b>	<b>Potential RV Loss</b>
1	£35,934
2	£5,0723
3	£13,404
4	£21,502
5	£35,933
6	£2,535
7	£37,530
8	£1,875
9	£2,765
10	£26,510
11	£18,845
12	£618
13	£2,875
14	£4,304
15	£4,152
16	£1,692
17	£1,757
18	£11,978
19	£25,343
19	£14,064
20	£7,230
21	£11,978
22	£22,180
23	£37,530
24	£22,475
25	£2,875
26	£45,394
27	£45,394



28	£34,994
<b>Total</b>	<b>£498,739</b>

### North Kesteven

<b>Business</b>	<b>Potential RV Loss</b>
1	£35,933
2	£37,530
3	£18,845
4	£17,212
5	£2,528
6	£15,425
7	£4,201
8	£11,978
9	£18,845
10	£3,615
11	£5,659
12	£5,659
13	£7,049
14	£26,259
15	£11,977
16	£13,815
<b>Total</b>	<b>£236,530</b>

### West Lindsey

<b>Business</b>	<b>Potential RV Loss</b>
1	£4,152
2	£1,402
3	£2,415
4	£9,476
5	£52,701
6	£5,489
7	£11,976
8	£37,530
9	£7,710
<b>Total</b>	<b>£132,851</b>

## 6. City of Lincoln Business Rates Growth Policy – awards

- 6.1 City of Lincoln implemented their Business Rates Growth policy from 1 April 2019.
- 6.2 The policy aims to a time-limited rate relief discount to new and extended business premises within the City, in the interest of building the Business Rates base, supporting economic growth and job creation. This policy supports the Council's open and partnership focussed approach to delivering growth as set out in the Vision 2020 Strategic Plan, particularly the objectives and ambitions relating to economic growth and reducing inequality.
- 6.3 Eligibility for this scheme will be dependent on the extent of the business premises

creation or extension, location and the impact of the new business or expansion plans has on the local economy.

6.4 Since the introduction of the policy, awards have been made as follows: -

Year	No. Businesses awarded	Total value of award (£)
2019	4	£55,123

## 7. North Kesteven Business Rates Growth Policy – awards

7.1 North Kesteven implemented their Business Rates Growth in 2016.

7.2 The rationale for offering businesses incentives to grow and locate in North Kesteven is derived from the **Our Economy** priority published in the Council's *Corporate Plan 2017-2020*.

7.3 Since the introduction of the policy, 6 businesses have been awarded this relief, totalling £411,230. The table below shows the date an award was initially made (the length if award could be for more than 1 year) and the total value awarded per year: -

Year	No. Businesses awarded	Total value of award (£)
2015	2	£152,380
2016	2	£159,360
2017	1	£29,491
2018	1 (1 pending)	£70,000
Total	6	£411,230

## 8. NDR Legislation Changes – 2019 and beyond

8.1 In recent years, there has been a number of changes to NDR Legislation due to the introduction of new reliefs to be awarded to businesses. In addition to this, there are significant legislation changes which are to be in place from 1 April 2020 and beyond.

8.2 The legislation changes have formed part of the 1-1 process with the NDR Team Leader, ensuring the Shared Service is prepared and proactive in undertaking the required work to introduce the new legislation. This will include system changes, training of staff and communication to businesses.

Some of the legislation is still in the early stages of conception, with requirements for Ministry of Housing, Communities and Local Government to engage with Billing Authorities. Details of all legislation is included in **Appendix 1** of this report.

## 9. Strategic Priorities

9.1 Both City of Lincoln Council and North Kesteven DC have a number of strategic priorities. Two that have an impact on the Non-Domestic Rate Service are:-

- City of Lincoln Council:
- North Kesteven DC:

9.2 Both authorities look to protect the poorest people. The Non-Domestic Rate Service is mindful of the strategic priorities when engaging with business ratepayers as they look to recover the business rate. Digital Inclusion, Channel Shift, Financial Inclusion and Partnership Working are all key priorities for the shared service.

9.3 At the City of Lincoln Council, a strategic priority that underpins the authority's vision for 2020 is '*Let's reduce inequality*'; within which, there is the aspiration '*Let's help people succeed*'. To achieve this aspiration, there is to be examination of the Discretionary Rate Relief Policy. This will involve an exploration of how the city council's Discretionary Rate Relief Policy could be used to create employment opportunities for residents.

## 10. Organisational Impacts

### 10.1 Finance

No direct financial implications arising from this report.

### 10.2 Legal Implications including Procurement Rules

No direct financial implications arising from this report.

### 10.3 Equality, Diversity & Human Rights

The equality implications have been considered within this report. In bringing forward any change to the existing criteria for awarding discretionary relief, consideration will be given as to whether a full Equality Impact Assessment is required.

## 11. Risk Implications

11.1 A Risk Register is in place for the Revenues and Benefits Shared Service.

## 12. Recommendation

12.1 Members are requested to note this report.

**Is this a key decision?** No

**Do the exempt information categories apply?** No

**Does Rule 15 of the Scrutiny Procedure Rules (call-in and urgency) apply?** No

**How many appendices does the report contain?** One

**List of Background Papers:**

None

**Lead Officer:**

Claire Moses, Revenues and Benefits Manager  
Telephone: 01522 873764

	Legislation	Details and stage of legislation
1.	Non Domestic Rate (Lists) Bill 2017-19	<p><b>Next Stage:</b> This was due to go to the House of Lords in September. However, Parliament was prorogued until 14 October and the subsequent decision of the Supreme Court resulted in Parliament reconvening. It is likely that this legislation is now at its former stage in the respective process and will be tabled again to go to the House of Lords, however, there is no date currently.</p> <p>Brings revaluation forward from 2022 to 2021 - changes revaluation from 5 years to 3 years - changes date of draft list from 30/9 to 31/12</p>
2.	GVA Grimley – NHS Mandatory Relief	<p><b>Next Stage:</b> Goes to court of appeal in November.</p> <p>Govt have already funded through public funding, likely to request return of this from NHS and use to refund BA's</p>
3.	Breathing Space	<p><b>Action CM:</b> Review of policies by CM during 2020/21</p> <p><b>Next Stage:</b> To be introduced from April 2021</p> <p>Bill not introduced yet - but before 31/12/2019  <a href="https://www.gov.uk/government/consultations/breathing-space-scheme-consultation-on-a-policy-proposal/breathing-space-scheme-consultation-on-a-policy-proposal">https://www.gov.uk/government/consultations/breathing-space-scheme-consultation-on-a-policy-proposal/breathing-space-scheme-consultation-on-a-policy-proposal</a></p> <p>Government commitment to support vulnerable consumers, stop problem debt occurring and help people out of problem debt. 60 day period of time to see advice and find a solution. For CT only monthly arrears, not ongoing debt, unless lost right to pay by instalments</p>
4.	Non Domestic Rates (Public lavatories) Bill	<p><b>Next Stage:</b> This was due to go to the House of Lords in September. However, Parliament was prorogued until 14 October and the subsequent</p>

	<b>Legislation</b>	<b>Details and stage of legislation</b>
		<p>decision of the Supreme Court resulted in Parliament reconvening. It is likely that this legislation is now at its former stage in the respective process and will be tabled again to go to the House of Lords, however, there is no date currently.</p> <p>Funding from central govt. to be confirmed                      Introduced 18.6.19, 2nd reading 10.7.19                      Provides 100% relief to public toilets - public and private owned - free or charge for use – mandatory</p>
5.	Hospital (Parking charges and business rates) Bill 2017-19	<p><b>Next Stage:</b> Awaiting next date for reading to be announced                      Introduced September 2017 2nd reading due 11.05.18 - objected and postponed to 15.3.19 - objected again and postponed                      To prohibit charging for car parking at NHS Hospitals for patients and visitors; to make provision for NHS Hospitals to be exempt from business rates; and for connected purposes.</p>
6.	Central Rating List (England)(Amendments) Regulations 2019	<p><b>Action Central Govt:</b> Laid 01.03.19, Effective 01.04.19  <b>Action / awareness for LA:</b> This will no longer be in the central list from 2021                      Updates central list regulations (SI 2005/551). Recognises split between national grid as an electricity generation asset and a system operator. From 2021 properties occupied by National Grid Electricity System Operator LTD will not be shown on the central list.</p>
7.	Non Domestic Rating (Preparation for Digital Services) Bill 2017-19	<p><b>Action Central Govt:</b> House of commons into 25.04.19, 2nd reading 13.05.19, committee and 3rd reading 20.05.19.                      Lords 1st reading 21.05.19, 2nd 11.06.19</p>

Appendix 1 – 25 November 2019 - Revenues and Benefits Joint Committee – Business Rates Update

Legislation	Details and stage of legislation
	<p><b>Action / awareness for LA:</b> Consultation and collaboration will be required. Allows HMRC to invest in digitising NDR. New design of the system will not come in to force until after the next reval in 2024</p>

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**SUBJECT: DISCRETIONARY HOUSING PAYMENTS UPDATE**

**DIRECTORATE: CHIEF EXECUTIVE**

**REPORT AUTHOR: CLAIRE MOSES, REVENUES AND BENEFITS MANAGER  
(SHARED SERVICE)**

## 1. Purpose of Report

1.1 To update Joint Committee regarding Discretionary Housing Payments (DHP) expenditure for 2019/20.

## 2. Executive Summary

2.1 Demand against 2019/20 DHP grants remains high. City of Lincoln has a remaining budget of £4,213 and North Kesteven of £3,117 – as shown in Table 1 of this report. 2019/20 DHP government grants for both City of Lincoln and North Kesteven have decreased from 2018/19, but demands are higher due to welfare reforms in this new financial year – for example, due to Universal Credit (UC).

2.2 The impact of UC in Lincoln and North Kesteven is constantly increasing, and will continue to do so as UC continues to be rolled out. The next stage of UC rollout is anticipated to begin in Summer 2020, with a managed migration process for all remaining legacy benefit customers.

## 3. Discretionary Housing Payments – Update

3.1 The table below updates on DHP spend to the end of October 2019:

Local Authority	Central Government DHP Grant 2019/20	DHP net spend as at Q2 2019/20	DHP committed for 2019/20	DHP Total spend for 2019/20	% Grant spent	Unallocated DHP Grant
City of Lincoln	£178,674	£123,724	£50,737	£174,461	97.64%	£4,213
North Kesteven	£113,943	£77,055	£33,022	£110,077	96.61%	£3,866

3.3 The table below breaks down the number of DHP applications received and determined up to Q2 2019/20

DHP applications –	City of Lincoln	North Kesteven
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<b>Year 2019/20</b>		
Total number awarded	413 <i>(October 2018/19 = 333)</i>	242 <i>(October 2018/19 = 208)</i>
No. awarded for Housing Benefit	255 <i>(October 2018/19 =259)</i>	165 <i>(October 2018/19 = 184)</i>
No. of HB awards who are Local Authority tenants	65.03%	52.62%
No. awarded for Universal Credit	158 <i>(October 2018/19 =74)</i>	77 <i>(October 2018/19 = 24)</i>
Average DHP award	£422 <i>(October 2018/19 = £461)</i>	£455 <i>(October 2018/19 = £492)</i>

- 3.4 The number of DHP applications for customers in receipt of Universal Credit has increased from 2018/19. This is indicative of the number of customers moving from legacy benefits to UC increasing throughout the year. Officers are also raising awareness of DHP, there is also a robust and consistent decision-making process in a highly-sensitive and complex area of administration.

Whilst the average award for DHP has reduced by £39 for City of Lincoln and £37 for North Kesteven, the total number of awards have increased by 80 for City of Lincoln and 34 for North Kesteven.

- 3.5 To help local authorities manage the impact of the Housing Benefit reforms announced in the Summer Budget 2015, overall DHP funding is £139.5 million for 2019/20, a decrease of £10.5 million compared to 2015/16 funding. This comprises of funding for four separate areas of support, being; Core funding, Local Housing Allowance (LHA), Removal of the Spare Room Subsidy (RSRS) and Benefit Cap. The distribution of the DHP funding is based on the effect of each element on individual local authorities.

The table below shows the grant figures for City of Lincoln and North Kesteven, also showing recent previous year grants, for comparison purposes.

	<b>City of Lincoln</b>	<b>North Kesteven</b>	<b>Comments</b>
<b>2019/20</b>	£178,674	£113,943	Grant decreases: City of Lincoln £29,950 (14.4%) North Kesteven £12,750 (10.1%)
<b>2018/19</b>	£208,624	£126,693	Grant decreases: City of Lincoln £33,881 (13.9%) North Kesteven £14,279 (10.1%)
<b>2017/18</b>	£242,505	£140,972	Grant increases: City of Lincoln £68,830 (28.4%)

			North Kesteven £33,458 (23.7%)
<b>2016/17</b>	£173,675	£107,514	Grant increases: City of Lincoln £33,997 (24.3%), North Kesteven £7,537 (7.5%)
<b>2015/16</b>	£139,678	£99,977	Grant decreases: City of Lincoln £54,630 (28.1%), North Kesteven £7,388 (6.9%)
<b>2014/15</b>	£194,308	£107,365	Grant in/decreases: City of Lincoln £5,433 (-0.03%), North Kesteven £9,136 (+0.09%)
<b>2013/14</b>	£199,741	£98,229	Grant increased City of Lincoln £100,882 (102%) North Kesteven £55,640 (130.6%)  Further additional grants successfully bid for: £40,000 (City of Lincoln), £35,000 (North Kesteven)
<b>2012/13</b>	£98,865	£42,589	

It is disappointing that the grants have decreased, as the demands on DHP requirements is continuing to increase.

- 3.7 An internal DHP working group continues to review DHP procedures with the aim of ensuring that those most in need of additional help with their housing costs receive appropriate support.

Each year, the DHP guidance is reviewed with recommendations made to Section 151 Officers of both City of Lincoln and North Kesteven for approval. Any changes proposed are with the aim to provide a positive impact in meeting local needs in relation to housing costs.

#### **4. Strategic Priorities**

- 4.1 Both City of Lincoln and North Kesteven have a number of strategic priorities. Two that have an impact on the Revenues and Benefits Service are:-

- Lincoln: "Let's Reduce Inequality".
- North Kesteven: "Our Community Our Economy".

#### **5. Organisational Impacts**

- 5.1 Finance: Decrease in DHP grants from central government for 2019/20 – by £29,950 for City of Lincoln, by £12,750 for North Kesteven. Any expenditure above these grants is borne by the individual local authority. Any central government grant not spent must be returned by the local authority to DWP.

Future welfare reform related financial implications beyond 2019/20, are currently unclear.

5.2 Legal Implications including Procurement Rules: There are no direct Legal or Procurement implications arising from this report.

5.3 Equality, Diversity & Human Rights: There are no direct Equality, Diversity or Human Rights implications arising from this report.

## **6. Risk Implications**

6.1 Levels of central government DHP grants have an impact on individual households in terms of affording their housing costs.

6.2 Welfare reform changes will have impacts on households in the districts – regarding which the shared service will endeavour to proactively respond.

## **7. Recommendation**

7.1 Members note the 2019/20 (as at October 2019) spend positions in relation to Discretionary Housing Payment expenditure, as well as Government Grant figures for DHP 2019/20.

**Is this a key decision?** No

**Do the exempt information categories apply?** No

**Does Rule 15 of the Scrutiny Procedure Rules (call-in and urgency) apply?** No

**How many appendices does the report contain?** None

**List of Background Papers:** None

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