

**Present:** Councillor Ray Cucksey (*in the Chair*),  
Councillor Sue Burke, Councillor Ric Metcalfe and  
Councillor Sally Tarry

**Apologies for Absence:** None.

**14. Confirmation of Minutes - 24 November 2022**

RESOLVED that the minutes of the meeting held on 24 November 2022 be confirmed.

**15. Declarations of Interest**

No declarations of interest were received.

**16. Performance Update**

Purpose of Report

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

**Decision**

That the report be noted, and an update be presented to the next meeting of the Committee on 27 June 2023.

Alternative Options Considered and Rejected

None.

Reason for Decision

The report provided information on revenues performance for Quarter 3 2022/23 in respect of (a) council tax for the City of Lincoln Council and North Kesteven District Council; and (b) business rates for the City of Lincoln Council, North Kesteven District Council and West Lindsey District Council. Comparisons to the national and local position in terms of performance were provided, where possible.

The Revenues and Benefits Shared Service had now been in operation for more than eleven years since 1 June 2011, and performance had largely been maintained and improved whilst continuing to provide value for money. Continual improvement and success was being achieved in both statistical and financial performance, as well as positive outcomes for customers of the partner local authorities. However, the Covid-19 pandemic had understandably impacted on some areas of performance and these impacts were likely to continue for many more months.

In respect of Council Tax, up to the end of Quarter 3 2022/23, in-year collection for Lincoln and North Kesteven was up by 1.76% and 0.75% respectively. However it should be noted that in appropriate circumstances Council Tax Energy Rebate payments had been credited to Council Tax accounts, as well as Council Tax Hardship Fund monies being allocated, which would be ‘inflating’ collection performance. Officers continued to monitor and manage collection closely. As at the end of January 2023, Council Tax in-year collection was up by 2.13% and 0.62% for City of Lincoln and North Kesteven respectively, compared to the end of January 2022.

In terms of the trend in Council Tax (CTS) caseloads, it could be seen that caseloads rose sharply in 2021 as an outcome of the impact of Covid-19 on the economy and residents’ incomes. The caseload then plateaued somewhat, however, with the ongoing cost of living pressures on residents, there was the potential that these caseloads may rise again.

In terms of Business Rates, up to the end of Quarter 3 2022/23, compared to the same point in 2021/22 in-year collection was up for all three local authorities: Lincoln (by 1.40%), North Kesteven (by 4.57%) and West Lindsey (by 7.62%). Although this was positive, it should be noted that for all three local authorities Covid Additional Relief Fund (CARF) monies had been added to accounts – and where ratepayers paid in full last year – there may be a credit for 2021-22 which was offsetting against this year’s liability. Collection also continued to be ‘skewed’ somewhat in recent financial years due to varying criteria/awards of the Expanded Retail Discount (ERD). All three collections were less ‘up’ compared to the end of Quarter 2 2022/23, so was perhaps starting to demonstrate a more accurate position on collection as the inflated performance due to CARF started to ‘even out’ as the financial year continued to progress. As at the end of January 2023, Business Rates in-year collection was up by 0.73%, 4.01% and 5.28% for City of Lincoln, North Kesteven and West Lindsey respectively, compared to the end of January 2022.

As at the end of the Quarter 3 2022/23, the number of outstanding revenues customers stood at a total of 656, of which 444 were from the City of Lincoln and 212 from North Kesteven which was a significant reduction from the end of Quarter 2 2022/23 (where 4,138 items were outstanding). This had taken place due to a number of reasons - staffing vacancies, being filled (further appointments to follow within establishment), “trawling” of outstanding work queues to complete items which had already been processed through other routes, as well as the intensive resources that had been required by the Council Tax Energy Rebate Scheme having reduced. With annual Council Tax billing due to take place in Quarter 4 for 2023/24, being as up to date as possible with Revenues work was vital to enable accurate bills to be issued. As at the end of January 2023, outstanding Revenues customers stood at 348 (City of Lincoln) and 139 (North Kesteven) – total 487.

Despite the significant demands on the Benefits Team, officers continued to assess claims and reported changes of circumstance promptly. As at the end of Quarter 3 2022/23:

End Quarter 3 2022/23	City of Lincoln	North Kesteven
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New Claims	15.97 days <i>(End Quarter 3 2021/22 16.45 days)</i>	19.93 days <i>(End Quarter 3 2021/22 16.54 days)</i>
Changes of Circumstance	5.76 days <i>(End Quarter 3 2021/22 5.37 days)</i>	4.10 days <i>(End Quarter 3 2021/22 3.99 days)</i>

Work continued to be closely managed and monitored to follow-up claims where information is outstanding. The rising level of outstanding work in Quarter 1 impacted on turnaround times, however with the level of work outstanding continuing to reduce – average processing times were also decreasing. For example, at the end of Quarter 1 2022/23 North Kesteven average processing time for New Claims was 21.57 days – this reduced by an average of 1.64 days – to 19.93 days – by the end of Quarter 3 2022/23.

The most recent national figures for Housing Benefit (HB) processing times were released on 25<sup>th</sup> January 2023, and were in respect of Quarter 2 2022/23. The key points were as below:

- *The average speed of processing for new HB claims is 21 calendar days in the latest quarter, which is one day lower than last quarter and one day higher than quarter 2 2021 to 2022. Since quarter 3 2020 to 2021 the rolling average year-end figures show the general trend to be an increasing one.*
- *The average speed of processing for change of circumstances to an existing HB claim is 9 calendar days in the latest quarter, which is one day higher than last quarter and one day higher than quarter 2 2021 to 2022. Since quarter 4 2020 to 2021, the rolling average year-end figures show the trend to be slightly increasing.*

As at the end of January 2023, for the year 2022/23 to date, Housing Benefit New Claims were being processed in an average of 15.87 days and 19.95 days for City of Lincoln and North Kesteven respectively. As at the end of January 2023, for the year 2022/23 to date, Housing Benefit Changes of Circumstance were being processed in an average of 4.96 days and 3.62 days for City of Lincoln and North Kesteven respectively.

As at the end of Quarter 3 2022/23, in-period collection of Housing Benefit overpayments stood at 137.75% for City of Lincoln and 139.43% for North Kesteven. Outstanding Housing Benefit overpayments debt also continued to decrease overall as at the end of Quarter 3 2023/24, at £2,403,988 for City of Lincoln and £1,303,080 for North Kesteven. As at the end of January 2023, Housing Benefit overpayment in-year collection was 134.51% for City of Lincoln and 140.18% for North Kesteven. At the end of January 2023, outstanding Housing Benefit overpayments debt was £2,395,888 and £1,286,244 for City of Lincoln and North Kesteven, respectively.

As at the end of Quarter 3 2022/23, there were 1,859 Benefit customers outstanding and awaiting assessment, (split Lincoln 1,373, North Kesteven 486) The positive direction of travel with regard to outstanding workload reduction continued, as with Revenues work it was vital to be as up to date as possible before annual Council Tax billing and benefits uprating's for 2023/24 Demands on the team would be significant in Quarter 4 as annual changes in circumstances were reported e.g. rent increases, pension increases. There also continued to be a significant demand on the Benefits Team, particularly in relation to Universal Credit related information impacting on Housing Benefit and Council Tax Support claims, as well as Discretionary Housing Payments and Household Support Fund. As at today, 23<sup>rd</sup> February 2023, outstanding Benefit customers stood at 1,006 (City of Lincoln) and 358 (North Kesteven) – total 1,364.

In terms of claims checked that were 'correct, first time' (with even £0.01p 'out' being classified as an incorrect assessment), at the end of Quarter 3 2023/24 the City of Lincoln figure stood at: 95.69% (*1,087 out of 1,136 checked*), and North Kesteven: 96.41% (*833 out of 864 checked*.) As at the end of January 2023, these figures were 95.72% for City of Lincoln and 96.36% for North Kesteven

Further analysis had been undertaken on the level of 'incorrectness' in assessment as requested by this Committee on 24 November 2022, as detailed at paragraph 5.3 of the officers report.

These checks were in addition to the significant amount of checks also carried out under the audit requirements of the annual Housing Benefit Subsidy claims.

Provision of welfare and benefits advice continued to be key as our Welfare Team continued to assist customers to access vital monies in the third quarter of 2022/23. Further detail was set out within the table at Paragraph 6.1 of the officer's report.

The Lincolnshire Financial Inclusion Partnership (LFIP) Conference was held at Boston United Football Club this week chaired by Martin Walmsley, Assistant Director, Shared Revenues and Benefits Service. It had been a very successful event. One speaker had noted that welfare advice teams contribute more to customers' pockets than the amount spent on their administrative expenses.

## **17. Revenues and Benefits - Financial Monitoring Quarter 3 2022/23**

### **Purpose of Report**

To provide the Shared Revenues and Benefits Joint Committee with the third quarter's (ending 31 December 2022) performance for the Revenues and Benefits Shared Service for 2022/23, as detailed at Appendix 1 to the report.

### **Decision**

That the actual position as detailed within the report be noted.

### **Alternation Options Considered and Rejected**

None.

### Reason for Decision

The approved budget for 2022/23 was agreed by the Shared Revenues and Benefits Joint Committee on 8 February 2022, which set a budget of £2,516,830 for the service.

At Quarter 1 the budget was increased to reflect New Burdens grants totalling £22,115, giving a revised budget of £2,538,950.

Financial performance for the third quarter of 2022/23 as detailed at Appendix 1 of the officer's report resulted in an overspend against the approved budget of £73,440, a deterioration of £76,040 since quarter two.

The forecast outturn for 2022/23 predicted that there would be an overspend against the approved budget of £107,405, a deterioration of £74,635 from quarter 2, as detailed at Appendix 2 of the officer's report.

The main forecast year-end variations against the approved budget for 2022/23 were noted within the table at paragraph 4.5 of the officer's report:

The key factor behind the deterioration in the forecast outturn at quarter three was the impact of the pay award, paid in December 2022, which was significantly higher than the budgeted pay award of 1.75% assumed within the base budget. The total impact across the shared service was £87,100.

The other key driver of the forecast overspend within the Revenues Local Taxation team was due to additional postage and IT costs as a result of administering the Council Tax Energy Rebate payments. Each Council had received a grant to compensate them for this, along with other administration costs associated with these payments, however these grants sat outside of the shared service budget.

For the period 1st April 2022 to 31<sup>st</sup> December 2022, new burdens grants had been received from Central Government as follows – City of Lincoln £59,673 and North Kesteven £64,514. These additional grants should be taken into consideration when assessing the forecast overspend.

It was noted that financial pressure was felt across the whole board with all local authorities feeling the extreme strain on resources in the budgetary process.

## **18. Revenues and Benefits-Base Budget Forecast 2023/24**

### Purpose of Report

To present the Base Budget Forecast for the Revenues and Benefits Shared Service for 2023/24.

### **Decision**

1. That the Base Budget Forecast for the Revenues and Benefits Shared Service for 2023/24 be approved.
2. Officers to report back to the next meeting of this Committee following further investigations made on any advances in technology to enable the service to further benefit for similar or less amounts of money.

#### Alternative Options Considered and Rejected

None.

#### Reason for Decision

The Base Budget Forecast for 2023/24 was included at Appendix 1 to the report, including a full reconciliation to the previous Base Budget Forecast outlined in Appendix 2.

Over the past decade costs had increased due to inflationary and other service pressures, with the Base Budget Forecast for 2023/24 of £2.879m, £530.4k higher than the initial Base Budget set in 2012/13, equivalent to an average increase of 2% p.a. Despite inflationary increases, ongoing efficiencies continued to be delivered by the Shared Service.

A full review of each line of the budget had taken place to ensure a fair representation of the activity of the service. This had led to budgets being transferred between different shared service functions but had not resulted in either authority significantly paying more than the other.

As a result of inflationary pressures there had been a significant increase in the base budget from last year, in the main, due to the significantly higher than anticipated pay award in 2022/23 (as agreed nationally, all pay scales were increased by a flat rate £1,925) compounded by an increased pay award forecast for 2023/24, alongside this City Council's primary pension contribution rate had increased from 17.3% to 23.4% increasing employee costs further. A full reconciliation to the previous Base Budget Forecast was included as Appendix 2 to this report.

It was agreed that further investigations would be carried out by officers on any advances in technology available which would enable the service to further benefit for similar or less amounts of money. This would be fed back to the next meeting of this Committee.

## **19. Business Rates Update**

### Purpose of Report

To provide the Shared Revenues and Benefits Joint Committee with an update on current issues within non-domestic rates, related to City of Lincoln Council, North Kesteven District Council and West Lindsey District Council.

### **Decision**

That the content of the report be noted.

### Alternative Options Considered and Rejected

None.

### Reason for Decision

The report focused on the changes announced as a result of Covid-19 and the support provided to businesses in the form of relief, – as grants were not directly paid by the Revenues and Benefits Shared Service, these were not covered in this report. The report also focused on the financial impact of recent appeals and reductions to rateable values.

Focus for both Government and billing authorities since the last meeting of Joint Committee had been a continuing response to Covid-19 measures announced since 11 March 2020.

The following updates were noted:

#### *Expanded Retail Discount*

The Expanded Retail Discount (ERD), first announced in response to the Covid19 pandemic and its impact on specific business sectors, was set to continue for a fourth year in 2023/24. The level of relief available under the discount had varied over the four years under a number of other parameters.

For 2023/24 the Chancellor set out:

- An increase in retail, hospitality and leisure relief from 50% to 75% up to £110,000 per business
- A freezing of the multipliers for a further year at 49.9p (small business multiplier) and 51.2p (standard multiplier)
- Historically at the beginning of every new Rating List there had been a transitional scheme which phased in a large increase in liability for the Non Domestic Rates and this was offset by phasing in large decreases in liability. However, the transitional scheme for 2023, phased in large increases but there was no phasing of decreases and those customers would feel the benefit of any reduction in their rateable value immediately.
- The Supporting Small Business Relief scheme would cap increases at £600 a year for any business losing eligibility for some or all Small Business Rate Relief or Rural Rate Relief at the 2023 revaluation.
- The scope of the discount for 2023/24 would return to pre-Covid-19 eligibility retail properties. Hospitality and leisure properties would continue to remain in scope, and the Rateable Value continued to be uncapped.

Properties that would benefit from the relief would be occupied hereditaments that were wholly or mainly being used:

- a) as shops, restaurants, cafes, drinking establishments, cinemas and live music venues;
- b) for assembly and leisure; or
- c) as hotels, guest & boarding premises and self-catering accommodation.

Government would continue to reimburse LA's that used their discretionary relief powers under Section 47 of the Local Government Finance Act 1988 (amended).

In terms of Expanded Retail Discount (ERD), the table at paragraph 4.5 of the officer's report reflected the significant discounts awarded in the last three years along with an estimate on the award to be granted in 2023/24. The table also set out the level of discount applied, ranging from 100% to 50%, with 2023/24 at 75%.

#### *Discount for Businesses Affected by Covid-19*

On 25 March 2021, the Government announced funding of £1.5 billion for businesses affected by Covid-19. The detail of the scheme was announced on 15 December 2021 with funding amounts allocated for each authority of £2,711,060 for City of Lincoln Council, £1,719,343 for North Kesteven District Council and £1,408,044 for West Lindsey District Council

Brief guidance from the Government stated that Local Authorities would be responsible for designing the discretionary relief schemes that were to operate in their areas as detailed at paragraph 5.3 of the officer's report.

Following discussions, guidelines for Lincoln, North Kesteven and West Lindsey, Covid Additional Relied Fund (CARF) schemes were agreed.

Round 1 applications closed on 31 March 2022 with those accounts that met the criteria of losses of 30% or more awarded 100% CARF relief for their 2021/22 liability.

Due to the low take up in Round 1, Round 2 of the application process was opened inviting businesses as advertised on social media to claim if they had 20% or more in losses by 31 July 2022.

Over the months February – September 2022, the Non-Domestic Rates (NDR) team in the Shared Service encouraged ratepayers to apply where they were able to evidence losses for the year 2021-22. The CARF scheme was advertised on social media and each of the Local Authority websites. Ratepayers were also contacted directly by the NDR team, helped by the Business Development teams.

Nationally, local authorities reported that they found it difficult to allocate this relief to ratepayers that may meet the scheme criteria, despite best efforts to identify and promote the scheme.

The final figures were detailed at paragraph 5.4 of the officer's report.



### *Fire Stations and Hospitals - Potential Reductions in Rateable Value*

On 4 December 2020, the Valuation Office Agency (VOA) advised all local authorities that they may start to see changes in the rateable values of hospitals and fire stations. These categories had been in discussion under the VOA's Group Pre-Challenge Review (GPCR) procedure. Further detail was outlined at paragraph 6 of the officer's report.

### *Court Buildings*

On 20 May 2021 we received a further notification from the Valuation Office that there was a GPCR Challenge regarding Court Buildings. This had been completed on a representative group of around 30 Courts. The agreed basis resulted in average reductions of around 18% - 1970's buildings may have higher reductions of around 28%. These reductions could go back to 1<sup>st</sup> April 2017. These had now been amended as per the Valuation Office schedule.

### *Museums*

On 8 June 2020, the Upper Tribunal (Lands Chamber) in the case of Stephen G Hughes (VO) vs Exeter City Council determined that the rateable value of the Royal Albert Memorial Museum was £1. The Court of Appeal had refused to allow the Valuation Office to Agency to appeal against this decision. This may be rolled out to other similar hereditaments.

### *Business Rates Review*

The final report for a Business Rates Review was also published at the Budget. The Budget and the Review committed in the longer term to improvements to the Business Rates system – which included;

- More frequent revaluations, moving to a revaluation every three years starting from the next revaluation which would come into force on 1st April 2023, the next being 1st April 2026 and so on.
- The process of revaluation would start approximately 2 years before the new valuations came into force. For the revaluation due on 1st April 2023, the rateable value would be assessed based on the rental evidence on 1st April 2021. There would be a new duty on the ratepayer to provide the Valuation Office with the information

For each revaluation, the Government introduced a Transitional Relief scheme. Transitional relief limited how much a bill could change each year. As the NDR system was self-financing, historically these limits had limited both large increases and large decreases. In the Budget, the government announced a change to the Transitional relief scheme so that only increases were limited. For any reduction in the rateable value, a ratepayer would receive the full benefit of the reduction immediately.

A new relief would be provided to support investments in property improvements, 2023-2028 in the first instance. It was expected that this would include a 12 month exemption on an increase in the rateable value where a property was improved. However, the final detail of this was not known at this time and would be reported as soon as known.

There was a new exemption for eligible low carbon heat networks that were listed as separate properties on the rating list, to be available from 2023 to 2025. Unfortunately, again, the announcement was made without any of the detail being known and so, the finer detail of this would be reported as soon as this was known.

## **20. Welfare Reform Update**

### Purpose of Report

To provide the Shared Revenues and Benefits Joint Committee with an update regarding various areas relating to the national welfare reform agenda, as well as current initiatives to support residents.

### **Decision**

That the content of the report be noted, with a further update to be presented to the next meeting of Shared Revenues and Benefits Joint Committee

### Alternative Options Considered and Rejected

None.

### Reason for Decision

This report provided Shared Revenues and Benefits Joint Committee with an update on the national and local position of welfare reform/other initiatives, with a specific focus on Universal Credit, Discretionary Housing Payments, Household Support Fund, Council Tax Energy Rebate, and Financial Inclusion matters.

The national Welfare Reform agenda had resulted in a significant impact on residents of Lincoln and North Kesteven since 2013 when certain changes were introduced such as Removal of Spare Room Subsidy, and Benefit Cap; this had continued as further changes had been introduced, such as the ongoing rollout of Universal Credit. These changes had resulted in major changes to the operation of our shared service, to ensure a proactive and positive response to welfare reform and the impacts on residents.

The following updates were noted:

### *Universal Credit*

The latest national figures published by the Department for Work and Pensions (DWP) were released on 13 December 2022, with statistics relevant to the period up to November 2022:

- 5,678,579 households receiving UC (an increase from 5,660,944 as reported at the last meeting of this Committee).

Local authority statistics were also available:

- City of Lincoln – 10,938 (10,460 as at the last report);
- North Kesteven – 6,474 (6,321 as at the last report).

On 25<sup>th</sup> April 2022, the Secretary of State for Work and Pensions made a statement in the House of Lords (regarding managed UC migration for working-age legacy benefits – with the aim of completing this migration by the end of 2024. Further information regarding the migration process was published on GOV.UK ([Completing the move to Universal Credit - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/news/completing-the-move-to-universal-credit)) and since then, an initial 500 cases in Bolton and Medway areas had been invited to migrate from legacy benefits to UC. Further sites were announced over summer 2022, with 250 migration notices issued in Truro, Falmouth, Harrow and Northumberland as part of the UC ‘discovery phase’.

On 10<sup>th</sup> April 2023, DWP released a research and analysis document entitled ‘Completing the move to Universal Credit: Learning from the Discovery Phase’, [Completing the move to Universal Credit: Learning from the Discovery Phase - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/research-analysis/completing-the-move-to-universal-credit-learning-from-the-discovery-phase)

There was currently no further detail as to the rollout schedule for other areas of the country, officers had made contact with DWP colleagues locally and nationally and would report back to this Committee with relevant updates at future meetings.

#### *Discretionary Housing Payments (DHP)*

City of Lincoln’s DHP government grant for 2022/23 was £129,643 and North Kesteven’s £85,166. The recent mid-year additional DHP grant announcement had increased both amounts marginally, therefore 2022/23 grants were now £132,330(Lincoln) and £86,931 (North Kesteven).

In addition to this, relatively small amount of un-allocated Council Tax Hardship Fund monies had been added to supplement the 2023/23 DHP government grants – City of Lincoln £8,426.13 (bringing the total 2022/23 DHP ‘budget’ to £140,756.13), North Kesteven £5,595.94 (bringing the total 2022/23 DHP ‘budget’ to £92,526.94).

The number of DHP applications received and determined in Quarter 3 2022/23 was detailed at paragraph 5.2 of the officers report.

DHP spend for up to the end of Quarter 3 of the financial year 2022/23 amounted to £105,180, (74.73% of DHP Grant) for City of Lincoln and £73,897 (79.87% of DHP Grant) for North Kesteven.

Overall DHP funding for 2022/23 had been cut nationally from £140m to £100m. Consequently, grants for City of Lincoln and North Kesteven had also been reduced by more than 29% each.

In 2021/22, Government DHP grants were supplemented for both authorities through the Councils' own funds, to keep paying eligible DHP claims. Longer term this was not sustainable, therefore much consideration had been undertaken in advance of 2022/23 in terms of how the reduced grant could help to assist those most in need of help with their housing costs.

DHP had become a longer-term form of help for some residents as their financial and housing situation each year had been as such to determine they remained entitled to DHP. However, DHP was generally only meant to be a short-term form of financial assistance.

In 2022/23, focus was now more towards shorter-term assistance through DHP, with availability and provision of appropriate debt/benefits advice and tenancy/housing options support for residents. Officers continued to monitor impacts and spend closely.

In 2022/23 there had been less applications but the average award per case was higher than in 2021/22. Also, it was anticipated spend would not exceed the government grant (plus 'top-up' from unallocated Council Tax Hardship Fund).

#### *Household Support Fund*

421 million was made available in 2021/22 for England to support those most in need over the winter period. This funding covered the period 6<sup>th</sup> October 2021 to 31<sup>st</sup> March 2022. £5,464,685.20 was awarded to Lincolnshire County Council under Section 31 of the Local Government Act 2001 to administer the scheme and provide assistance to households most in need.

The funding was primarily to be used to support households in the most need with food, energy and water bills. It could also be used to support households with wider essential costs. At least 50% of funding must have been spent on families with children.

A Lincolnshire Districts' scheme was live from 1<sup>st</sup> December 2021 to the end March 2022. Our Revenues and Benefits Shared Service worked with a range of other organisations making referrals and delivering these Household Support Fund payments for City of Lincoln and North Kesteven.

For the months of December 2021-March 2022, £427,542 was awarded by City of Lincoln Council and £271,082 by North Kesteven.

As part of the Chancellor of the Exchequer's Spring Statement in March 2022, a second Household Support Fund was announced. Detail was subsequently provided in April 2022, with an equivalent amount of £5.4 million again being allocated to Lincolnshire County Council. Funding criteria included a new requirement for at least 33.33% of payments to be allocated to those of pension age. The table at paragraph

6.2 of the officer's report showed how these funds were allocated for the second round of Household Support Fund.

Lincolnshire was allocated £5.46m for the third round of the Household Support Fund. This time, the government did not ringfence any of this funding for particular groups of people. However, local authorities were asked to consider groups who may not have benefitted from any of the recent cost of living support.

Household Support Fund wave 3 phase 1 was delivered in Lincoln and North Kesteven in December 2022 and January 2023. Applications for support were taken from our referral partners and vouchers/payments allocated accordingly. Also, for those in receipt of Housing Benefit and not entitled to the national Cost of Living Payment, a £250 voucher was issued (via the Post Office) to these households. To the end of January 2023, under this phase of Household Support Fund, payments totalling £241,250 had been allocated to City of Lincoln residents, £209,112 to North Kesteven residents.

In terms of Household Support Fund 3 phase 2 – to be delivered in February/March 2023 (all payments to be made by the end of 31<sup>st</sup> March 2023), £61,204 had been allocated to City of Lincoln and £42,078 to North Kesteven. Following decision-making protocols, officers were now working with partner organisations to deliver these monies promptly, effectively and to those identified/referred as being most in need

In his Autumn statement the Chancellor of the Exchequer announced an extension to the Household Support Fund, running from 1st April 2023 to 31<sup>st</sup> March 2024. Guidance and allocations for this round of funding were still to be announced. Officers were working on protocols in terms of decision-making for the wave of funding, which would be further progressed in due course once more information was released by central government.

### *Council Tax Energy Rebate*

On 3<sup>rd</sup> February 2022, Central Government announced a package of support known as the Energy Bills Rebate to help households with rising energy bills, worth £9.1 billion in 2022-23 which included:

- A £150 non-repayable rebate for households in England in Council Tax bands A to D, known as the Council Tax Rebate;
- £144 million of discretionary funding for billing authorities to support households in need but not eligible for the Council Tax Rebate, known as the Discretionary Fund.

All Discretionary Fund payments had to be made by 30<sup>th</sup> November 2022. Further details of the operation of the discretionary schemes were outlined at paragraph 7 of the officer's report.

### *Energy Bill Support Scheme Alternative Funding (EBSS AF)*

In October 2021, Central government announced that the EBSS AF scheme was intended to provide the £400 of support for households across the UK that would otherwise miss out on the Energy Bills Support Scheme – which the vast majority of households were already receiving – as they did not have a domestic electricity contract. It would also support the delivery of £100 Domestic Alternative Fuel Payments where these could not be automatically delivered to households through other means, such as suppliers.

The government further announced, on 19<sup>th</sup> December 2022, how people in England, Scotland and Wales without a direct relationship to a domestic energy supplier, including many care home residents and those living in park homes, would receive a £400 discount on their fuel bills through EBSS AF.

The government was also providing a further £200 Alternative Fuel Payment (AFP) to help those households in Great Britain who used alternative fuels such as biomass or heating oil to meet energy costs this winter. Most households eligible for the AFP support in Great Britain, would receive payment automatically via their electricity supplier in February, with no need to take any action. Those households who would need to apply for the AFP, for example because they did not have a relationship with an electricity supplier, would be able to do so in February, through the same GOV.UK portal as the one to be used to apply for support under the EBSS Alternative Funding scheme.

An update was received on 20<sup>th</sup> January 2023 stating that the scheme had been delayed, and further information would be provided in due course. It was now anticipated this scheme will go live in week-commencing 20<sup>th</sup> February 2023.

### *Council Tax Support Scheme*

On 23<sup>rd</sup> December 2022, central government provided guidance to local authorities regarding a £100 million Council Tax Support Fund for 2023/24, whereby awards of up to £25 were to be made to Council Taxpayers in receipt of Council Tax Support, - with an element of funding also to be made for discretionary local funds in 2023/24. Funding allocations for City of Lincoln and North Kesteven were £222,803 and £142,500, respectively. Subject to a required ICT 'patch' being made available from our software providers NEC, and being successfully tested and installed into a live environment, it was hoped that the awards would be made as part of the 2023/24 annual Council Tax billing processes. Remaining funding would then be considered for both local authorities, with recommendations made in the early part of 2023/24, in relation to local discretionary schemes.

### *Financial Inclusion*

Financial inclusion continued to be a key objective and factor in many areas of LiNK's work. The Lincolnshire Financial Inclusion Partnership (LFIP) was currently chaired by the Assistant Director, Shared Revenues and Benefits for North Kesteven District Council and City of Lincoln Council, - which brought together organisations and partners to promote and raise the profile of financial inclusion across the county. LFIP aimed to ensure that everyone had the capability and opportunity to access appropriate financial services and products needed to participate fully in society.

LFIP worked to develop, implement and, when available, gain funding for positive solutions to improve financial inclusion for all people within Lincolnshire. The FIP also provided a forum for sharing good practice and information.

A highly successful LFIP Conference was held on 21<sup>st</sup> February 2023 , with 120 attendees, some positive speakers and examples of fantastic Financial Wellbeing initiatives taking place in Lincolnshire.