

STOUR VALLEY AND POOLE PARTNERSHIP JOINT COMMITTEE



Report subject	2019/2020 Performance and Budget Review
Meeting date	23 December 2019
Status	Public Report
Executive summary	To review the budget, processing and collection performance of the Stour Valley and Poole Partnership (SVPP)
Recommendations	<p>It is RECOMMENDED that:</p> <ul style="list-style-type: none"> (a) the performance and budget of the Stour Valley and Poole Partnership be noted (b) the Partnership declare an in year £100,000 underspend on the 2019/20 budget (c) any additional underspends for 2019/20 be set aside to SVPP reserves as detailed in item 26 of this report (d) the proposed allocation of reserves for SVPP be brought to the next meeting of Joint Committee for consideration
Reason for recommendations	To monitor the performance and budget of the Partnership for 2019/20.

Portfolio Holder(s):	Not applicable - SVPP
Corporate Director	Not applicable - SVPP
Contributors	Emma Richens, Project Accountant. BCP Council. Paul Hudson, Head of SVPP
Wards	All
Classification	Decision

Background

1. Performance and Budget monitoring is a role of the Scrutiny Panel on behalf of Joint Committee.
2. Performance was monitored by Scrutiny for the 'half-year' position and budget up to end November at their meeting of 18 December 2019.

Performance Monitoring

3. Data on the processing of new claims and changes in circumstances for Housing Benefit and Council Tax Support are extracted monthly.
4. Data on percentage of collected Council Tax and Business Rates is a local indicator which has been retained by the Partnership and is used by each Council & Precepting Authority for budget setting purposes. The indicator is in respect of "in-year collection".
5. The Customer Access Team work to performance indicators for call handling and face-to-face interviews at each of the Council's access points as reviewed by Scrutiny Panel and set by the Joint Committee
6. Performance targets are agreed each year by the Scrutiny Panel and Joint Committee and published to the public and staff in the annual Business Plan and Customer Charter.
7. SVPP are responsible for the Christchurch and Poole areas of BCP Council and the East and North areas of Dorset Council. For Quarter 3 performance of the SVPP will be reported alongside the targets set by BCP Council and Dorset Council.

2019/20 BENEFIT PERFORMANCE INDICATORS

8. The Benefits service has continued with the trend of working closely to target. Officers continue to monitor the impact of Universal Credit on customers and processing times.

9. Benefit processing performance for the period to 30 September (Q2) was:

Average time taken (calendar days) to process a new claim

New Claims	2018/19 Q2 Half Year 1 April to 30 Sep	2019/20 Q2 Half-Year 1 April to 30 Sep	Target
SVPP BCP	17 days	16 days	19 days
SVPP Dorset	17 days	16 days	

Average time taken to process a change in circumstances

Changes	2018/19 Q2 Half Year 1 April to 30 Sep	2019/20 Q2 Half-Year 1 April to 30 Sep	Target
SVPP BCP	7 days	5 days	10 days
SVPP Dorset	7 days	5 days	

2019/20 COUNCIL TAX AND BUSINESS RATES COLLECTION

10. The 'in-year' collection rate target for SVPP is 98% of all Council Tax and Business Rates to be collected within the financial year. Overall collection is estimated to be between 99% and 99.5%, but the service monitors in-year collection closely to ensure funds are collected in a timely manner for each Council.

11. At the half-year position Council Tax collection, is slightly down on last year and should this continue at end quarter 3 addition measure will be introduced.

Council Tax collected in Year

CTAX Collection	2018/19 Q2	2018/19 Achieved in Year	2019/20 Q2	Target for year
SVPP BCP	56.7%	97.7%	56.5%	SVPP 98%
SVPP Dorset	56.9%	98.6%	56.6%	

Percentage of Business Rates collected in year

Rate Collection	2018/19 Q2	2018/19 Achieved in Year	2019/20 Q2	Target for year
SVPP BCP	57.1%	98.4%	58.0%	SVPP 98%
SVPP Dorset	57.5%	98.2%	58.0%	

ENFORCEMENT SERVICE

12. The Stour Valley Enforcement Agency (SVEA) provides the internal enforcement service for Council Tax and Business Rates for SVPP and from April 2018 for Bournemouth.
13. The operational budget for the service in 2019/20 was set at £426,000 with an overall income target of £175,000 above expenditure.
14. The SVEA operational costs for the 2019/20 year are projected as £384,000 (due to staff vacancies) and income received as end November 2019 is £351,000. If fee income continues at the same ratio the overall income received will be £526,500, making the service income above expenditure £142,500.
15. As the present income calculation represents larger than a 5% variance a full report on the SVEA budget will be brought to the next Scrutiny Panel for consideration on behalf of Joint Committee.

CUSTOMER ACCESS

16. It was recognised prior to 2019/20 that the first few months of the financial year would see increases in demand as result of Local Government Re-Organisation.

Telephony Services

17. Average calls per month have now stabilised following a very busy end of year in April and May. The trend is reducing as in previous years and it is predicted a reduction of approximately 5% for the year overall. In comparison we are reporting increases in our digital services, reduction in post received but again increases in customers emailing the service.

SVPP Telephone Demand	Q1	Q2	Total Apr – Oct (7 months)	Target
Call Demand – Customer Access Team	34,892	29,010	75,017	To reduce calls
Call Demand – SVPP	19,106	15,466	40,023	
Total Call Demand	53,998	45,176	115,040	
Percentage Answered	93%	94%	94%	85%
Average wait times	03:40	02:43	02:44	n/a

Face-to-face Services

18. This is the second year where the service operates an appointment service. There is provision to see customers at all access points with or without an appointment.
19. The service continues to see a reduction in demand by officers assisting users to use digital services or assisting them through the telephony service.
20. The CAT has reported a 65% reduction in face-to-face demand since the implementation of appointments, alongside channel shift and the roll out of Universal Credit.

SVPP Council Counter Services	Q1	Q2	Total Apr – Oct (7 months)	Target
Total Demand SVPP	2,326	1,892	4,966	Reduce footfall
Percentage seen within 20 mins – drop in without appointment	98%	99%	99%	85%
Total Demand – Poole	1,359	1,162	2,823	Reduce footfall
Total Demand – Christchurch	274	208	602	
Total Demand – East Dorset	241	198	569	
Total Demand – North Dorset	435	308	927	
Total Demand – Gillingham	17	16	45	

Post, Email and Digital Services

21. This represents a new indicator for publication in 2019/20, where the service is able to report the number of digital transactions directly received for SVPP.
22. This data does not include the large number of automated/ digital processes received through external data sharing routes such as Department for Work and Pensions / HMRC.
23. The chart below is for consideration by members and details the methods of direct communication by our customers. Many of the digital applications are assisted by CAT staff either by appointments or the telephony service.

Digital Services for SVPP through Customer and Business Support	Q1	Q2	Total Apr – Oct 2019/20	Data Apr-Oct 2018/19	Target
Number of postal items received + scanned	7,869	2,283	11,796	25,781	To reduce post
Total customer digital transactions	21,523	19,082	47,948	33,537	To increase digital transactions and automation
<i>Number of emails resolved</i>	<i>12,710</i>	<i>10,282</i>	<i>27,460</i>	<i>21,239</i>	
<i>Number of Victoria Forms (Benefits)</i>	<i>2,735</i>	<i>2,202</i>	<i>5,653</i>	<i>2,978</i>	
<i>Number of Digital Change of Address</i>	<i>3,241</i>	<i>4,214</i>	<i>8,806</i>	<i>3,834</i>	
<i>Number of Digital Direct Debit</i>	<i>2,422</i>	<i>1,977</i>	<i>5,055</i>	<i>4,885</i>	
<i>Number of EBilling Sign Up</i>	<i>415</i>	<i>407</i>	<i>974</i>	<i>601</i>	

Summary of Financial Implications

BUDGET POSITION 2019/20

24. The 2019/20 Budget set for the Partnership by Joint Committee was £5,101,000. This represented a year-on-year reduction in the cost of the service since its creation in 2014.
25. The budget position as at end November is attached as Appendix 1. This details that at the present time the Partnership is forecasting a potential underspend of £239,000.
26. Members may wish to propose the following actions in respect of the forecast underspend:
 - That £100,000 of this potential underspend is declared to support 2019/20 budgets for BCP and Dorset Councils on the existing costs share ratio
 - That The budget and income of the SVEA be fully reviewed at the next meeting of Scrutiny and if necessary £50,000 be set aside to mitigate any income shortfall that may be identified within the SVEA
 - That any remaining underspends for 2019/20 be set aside with existing reserves to support the Partnership in introducing Agile Working, automated processes, software needs and costs that arise in respect of the future delivery of Revenues and Benefits Services
27. The Management Board continues to allocate New Burdens Funding Grant for each Council to support the costs of temporary staff which has allowed Indexing to be carried out on the day.

Summary of legal implications

28. Not applicable to this report

Summary of human resources implications

29. Not applicable to this report

Summary of environmental impact

30. Not applicable to this report

Summary of public health implications

31. Not applicable to this report

Summary of equality implications

32. Not applicable to this report

Summary of risk assessment

33. The Risk Register for 2019/20 is being reviewed to acknowledge the two new Councils and their objectives for the Service. This will be fully presented at the next meeting of Scrutiny.
34. Risk Register for 2019/20 is being reviewed to acknowledge the two new

Background papers

35. Report to SVPP Scrutiny Panel 18 December 2019
(As Scrutiny Panel had not met at the time of producing this report, any comments raised will be provided as a verbal update for Joint Committee.)

Appendices

1. SVPP Budget Summary 2019/20