

STOUR VALLEY AND POOLE PARTNERSHIP SCRUTINY PANEL

2019/20
Performance and
Budget Review

Date of Meeting: 26 February 2020

Lead Member: Not Applicable – SVPP Scrutiny Panel

Lead Officer: Diane Milne. Collection Services Manager SVPP

Executive Summary:

To review the budget, processing and collection performance of the Stour Valley and Poole Partnership (SVPP)

Equalities Impact Assessment:

Not Applicable to this report

Budget:

Operating Budget for SVPP for 2019/20 £5,101,000

Risk Assessment:

Not Applicable to this report

Other Implications:

Not Applicable to this report

Recommendation:

That members:

- (a) note and comment on the performance of the Stour Valley and Poole Partnership to end of quarter 3
- (b) note and comment on the budget of the Stour Valley and Poole Partnership to 31 January 2020
- (c) review and make comment on the SVEA variance report

Reason for Recommendation:

To review, and note for SVPP Joint Committee, performance of the Partnership to its budget and performance targets.

Appendices: A. SVEA variance report

Background Papers:**Officer Contact:**

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1. BACKGROUND

- 1.1. Performance and Budget monitoring is a role of the Scrutiny Panel on behalf of Joint Committee.
- 1.2. This is the second monitoring report presented to Scrutiny Panel for 2019/20.
- 1.3. This report provides a summary of the quarter 3 position on processing performance and as at end of January 2020 for SVPP Budget.

2. PERFORMANCE MONITORING

- 2.1. Data on the processing of new claims and changes in circumstances for Housing Benefit and Council Tax Support are extracted monthly.
- 2.2. 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".
- 2.3. 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
- 2.4. 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.
- 2.5. SVPP are responsible for the Christchurch and Poole areas of BCP Council and the East and North areas of Dorset Council. Performance of the SVPP is now reported alongside the targets set by BCP Council and Dorset Council.

3. BENEFIT PERFORMANCE INDICATORS

- 3.1. The Benefits service has continued with the trend of working closely to target.
- 3.2. Benefit processing performance for the period to 31 December 2019 (Q3) was:

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

New Claims	2018/19 Q3 1 April to 31 Dec	2019/20 Q3 1 April to 31 Dec	Target
SVPP BCP	17 days	14 days	19 days
SVPP DC	17 days	16 days	
BCP Council	Not applicable	*16 days (Q2)	16 days
Dorset Council	Not applicable	*16 days (Q2)	19 days

Average time taken to process a change in circumstances

Changes	2018/19 Q3 1 April to 31 Dec	2019/20 Q3 1 April to 31 Dec	Target
SVPP BCP	7 days	5 days	10 days
SVPP DC	7 days	5 days	
BCP Council	Not applicable	*5 days (Q2)	6 days
Dorset Council	Not applicable	*4 days (Q2)	7 days

*Q2 Data from Government Housing Benefit processing data available nationally

4. COUNCIL TAX AND BUSINESS RATES COLLECTION

- 4.1. 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.
- 4.2. At the quarter 3 position Council Tax collection remains slightly down. Quarter 4 increased recovery timetable has been implemented, as in previous years, and it is expected that target be reached.

Council Tax collected in Year

CTAX Collection	2018/19 Q3	2018/19 Achieved in Year	2019/20 Q3	Target for year
SVPP BCP	84.4%	97.7%	84.1%	98%
SVPP DC	84.7%	98.6%	84.4%	
BCP Council	Not applicable	Not applicable	82.1%	97.5%
Dorset Council	Not applicable	Not applicable	85.7%	98%

- 4.3 At quarter 3 position Business Rates collection is up on the same point 2018/19. It is expected that target will be reached.

Percentage of Business Rates collected in year

Rate Collection	2018/19 Q3	2018/19 Achieved in Year	2019/20 Q3	Target for year
SVPP BCP	83.2%	98.4%	83.5%	98%
SVPP Dorset	84.5%	98.2%	85.3%	
BCP Council	Not applicable	Not applicable	82.6%	98%
Dorset Council	Not applicable	Not applicable	84.9%	98%

5. ENFORCEMENT SERVICE

- 5.1. The operational budget for the service in 2019/20 was set at £426,000 with an overall income target of £175,000 above expenditure.
- 5.2. The SVEA operational costs for the 2019/20 year are projected as £378,034 (due to staff vacancies) and income received as end of quarter 3 (31st December 2019) is £388,892. If fee income continues at the same ratio the overall income received will be circa £520,000, making the service income above expenditure circa £141,000.
- 5.3. As the present income forecast represents larger than a 5% variance a full report is attached at Appendix A.

6. CUSTOMER ACCESS

- 6.1. 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

- 6.2. Call demand is as expected for the time of year. We have seen an increase in the call wait times due some vacancies and experiencing absences over

winter. We have been training new members of the team so hope to improve our call wait times prior to annual billing.

SVPP Telephone Demand	Q1	Q2	Q3	Total Apr – Dec	Target
Call Demand – Customer Access Team	34,892	29,710	26,720	91,322	To reduce calls
Call Demand – SVPP	19,106	15,466	14,039	48,611	
Total Call Demand	53,998	45,176	40,759	139,933	
Percentage Answered	93%	94%	95%	94%	85%
Average wait times	03:40	02:43	03:29	03:17	

Face-to-face Services

- 6.3. Appointment services continue to work effectively
- 6.4. Over the winter months we have seen a further decrease in customers coming to see us apart from Allenview (Wimborne) where we have seen a slight increase.
- 6.5. As well as Revenue and Benefit services we provide corporate front office services at Nordon (Blandford/DC) and Civic Centre (Poole/BCP).

SVPP Council Counter Services	Q1	Q2	Q3	Total Apr – Dec	Target
Total Demand SVPP	2,326	1,892	1,598	5,816	Reduce footfall
Percentage seen within 20 mins – drop in without appointment	98%	99%	98%	99%	85%
Total Demand – Poole	1,359	1,162	863	3384	Reduce footfall
Total Demand – Christchurch	274	208	198	680	
Total Demand – East Dorset	241	198	218	657	
Total Demand – North Dorset	435	308	299	1042	
Total Demand – Gillingham	17	16	23	53	

7. Post, Email and Digital Services

- 7.1. 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.
- 7.2. 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.
- 7.3. Email demand continue to increase and whilst this is an opportunity to increase digital services, customer expectation on the speed of email response is high. We find a lot of email demand is 'unstructured' and therefore encourage completion of digital forms where possible to ensure we gather the correct information in one contact meaning we are able to process much more efficiently.

7.4. We promote digital at first point of contact and the increase in uptake is showing this is successful.

7.5. The chart below 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	Q3	Total Apr-Dec 19/20	Total Apr-Dec 18/19	Target
Total digital transactions	21,523	19,082	16,505	57,110	43,571	To increase digital transactions and automation
Emails resolved	12,710	10,282	8,613	31,605	26,702	
Victoria Forms (Benefits)	2,735	2,202	2,115	7,052	4,455	
Digital Change of Address	3,241	4,214	3,692	11,147	5,618	
Digital Direct Debit	2,422	1,977	1,681	6,080	6,011	
EBilling Sign Up	415	407	404	1,226	785	
Postal items received + scanned	7,869	2,283	5,322	15,474	31,746	To reduce post

8. Complaints and compliments

- 1.1. Complaints are monitored and reviewed regularly, compliments are celebrated on the notice board at Northmead House.
- 1.2. 2019/20 complaints and compliments will be presented in the Q1 2020 performance and budget report, for your review, comment and agreement on frequency of future reporting.

9. BUDGET POSITION 2019/20

- 7.1. The SVPP 2019/20 'Year 5' 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.
- 7.2. The budget position as at end January 2020 is attached as Appendix B. This details that at the present time the Partnership is forecasting a potential underspend of £264,000.

7.3. FINANCIAL AND RISK

- 9.1. 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.
- 9.2. A presentation on the proposed 2020/21 Risk Register is to be tabled at the meeting for comment by members prior to its publication to staff.

10. CONCLUSION

- 10.1. Overall to date in 2019/20 the SVPP is meeting its performance and budget targets. There will need to be close monitoring of resource allocations during

this last quarter with regards to collection of Council Tax and Business Rates if the existing targets are to be maintained.

Appendices

A: SVEA variance report

B: Budget Report January 2020 (2019/20)

C: Risk Register 2020/21 (to be presented at meeting)

Diane Milne. Collection Services Manager