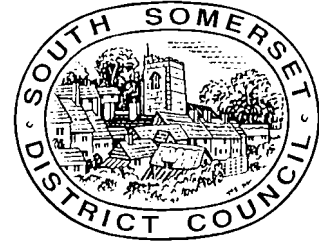


South Somerset District Council

Notice of Meeting



District Executive

Making a difference where it counts

Thursday 2nd March 2017

9.30 am

**Council Chamber
Council Offices
Brympton Way
Yeovil
Somerset BA20 2HT**



Disabled access and a hearing loop are available at this meeting venue.

Members listed on the following page are requested to attend the meeting.

The public and press are welcome to attend.

If you would like any further information on the items to be discussed, please contact the Democratic Services Manager on 01935 462148 or democracy@southsomerset.gov.uk

This Agenda was issued on Wednesday 22 February 2017.

A handwritten signature in black ink that reads "Ian Clarke".

Ian Clarke, Assistant Director (Legal & Corporate Services)

This information is also available on our website
www.southsomerset.gov.uk and via the mod.gov app



District Executive Membership

Ric Pallister
Clare Aparicio Paul
Carol Goodall
Peter Gubbins
Henry Hobhouse
Jo Roundell Greene
Sylvia Seal
Peter Seib
Angie Singleton
Nick Weeks

Information for the Public

The District Executive co-ordinates the policy objectives of the Council and gives the Area Committees strategic direction. It carries out all of the local authority's functions which are not the responsibility of any other part of the Council. It delegates some of its responsibilities to Area Committees, officers and individual portfolio holders within limits set by the Council's Constitution. When major decisions are to be discussed or made, these are published in the Executive Forward Plan in so far as they can be anticipated.

Members of the Public are able to:-

- attend meetings of the Council and its committees such as Area Committees, District Executive, except where, for example, personal or confidential matters are being discussed;
- speak at Area Committees, District Executive and Council meetings;
- see reports and background papers, and any record of decisions made by the Council and Executive;
- find out, from the Executive Forward Plan, what major decisions are to be decided by the District Executive.

Meetings of the District Executive are held monthly at 9.30 a.m. on the first Thursday of the month in the Council Offices, Brympton Way.

The Executive Forward Plan and copies of executive reports and decisions are published on the Council's web site - www.southsomerset.gov.uk.

The Council's Constitution is also on the web site and available for inspection in Council offices. The Council's corporate priorities which guide the work and decisions of the Executive are set out below.

Questions, statements or comments from members of the public are welcome at the beginning of each meeting of the Council. If a member of the public wishes to speak they should advise the committee administrator and complete one of the public participation slips setting out their name and the matter they wish to speak about. Each individual speaker shall be restricted to a total of three minutes. Answers to questions may be provided at the meeting itself or a written reply will be sent subsequently, as appropriate. Matters raised during the public question session will not be debated by the Committee at that meeting.

Further information can be obtained by contacting the agenda co-ordinator named on the front page.

District Executive

Thursday 2 March 2017

Agenda

1. Minutes of Previous Meeting

To approve as a correct record the minutes of the District Executive meeting held on 1 February 2017.

2. Apologies for Absence

3. Declarations of Interest

In accordance with the Council's current Code of Conduct (as amended 26 February 2015), which includes all the provisions relating to Disclosable Pecuniary Interests (DPI), personal and prejudicial interests, Members are asked to declare any DPI and also any personal interests (and whether or not such personal interests are also "prejudicial") in relation to any matter on the Agenda for this meeting.

Members are reminded that they need to declare the fact that they are also a member of a County, Town or Parish Council as a Personal Interest. Where you are also a member of Somerset County Council and/or a Town or Parish Council within South Somerset you must declare a prejudicial interest in any business on the agenda where there is a financial benefit or gain or advantage to Somerset County Council and/or a Town or Parish Council which would be at the cost or to the financial disadvantage of South Somerset District Council.

4. Public Question Time

5. Chairman's Announcements

Items for Discussion

6. District-wide Voluntary Sector Grants 2017/18 (Pages 4 - 50)

7. Council Tax Penalties & Civil Penalties in Housing Benefit (Pages 51 - 57)

8. Proposed Changes to Business Rates Relief Policy (Pages 58 - 72)

9. Review of Discretionary Housing Payments Policy (Pages 73 - 113)

10. Quarterly Corporate Performance and Complaints Monitoring Report - 3rd Quarter 2016/17 (Pages 114 - 123)

11. District Executive Forward Plan (Pages 124 - 128)

12. Date of Next Meeting (Page 129)

Agenda Item 6

District-wide Voluntary Sector Grants 2017/18

Executive Portfolio Holders: Cllr Ric Pallister, Cllr Sylvia Seal and Cllr Carol Goodall,
Directors: Rina Singh, Deputy Chief Executive,
Martin Woods, Service Delivery
Assistant Directors: Helen Rutter, Communities
Steve Joel, Health and Well-Being
Service Managers: Lynda Pincombe, Community Health and Leisure Manager
Adam Burgan, Arts and Entertainment Manage
Report Contributors: David Crisfield, Third Sector and Equalities Coordinator
Stephen Barnes, Play & Youth Facilities Officer
Pauline Burr, Arts Development Officer
Contact Details: david.crisfield@southsomerset.gov.uk (01935 462240)
stephen.barnes@southsomerset.gov.uk (01935 462408)
pauline.burr@southsomerset.gov.uk (01935 845944)

Purpose of the Report

1. This set of reports seeks the approval of District Executive on the levels of funding for the following district-wide organisations seeking financial support from SSDC in 2017/18.
 - Access for All
 - Citizens Advice South Somerset (CASS)
 - SPARK
 - Somerset Rural Youth Project
 - Actiontrack Performance Company,
 - Take Art
 - Somerset Arts Week
 - Somerset Film

Forward Plan

2. Yes, a standing annual report for March.

Public Interest

3. SSDC supports a range of community groups and voluntary sector organisations via its one-off community grants programme, administered via the Area Committees and through regular funding of strategic district-wide organisations that report to District Executive. This financial investment in the sector not only provides direct support to groups working in the local community but also assists the council in the delivery of the council plan.

Recommendations

4. That District Executive:
 - a) Approve the proposed funding for 2017/18 at the levels indicated in Table 1.
 - b) Approve the proposal to conduct a review into the future funding relationship with SPARK and CASS to be reported to members in the autumn of 2017. This will inform the funding relationship from 2018/19 onwards.

Overview

5. **Table 1 (below)** – summarises the financial position if all the recommendations in the following reports are supported:

Description	What is it for	Budget for 2017/18	Budget Holder/Lead Officer	Funding recommended
Equalities & Diversity	SLA with Access for All	10,000	Helen Rutter	9,000
CAB Grants	SLA with Citizens Advice South Somerset	121,730	Helen Rutter	121,730
CVS Grants	SLA with SPARK (previously SSVCA)	74,260	Helen Rutter	74,260
Youth Development	SLA with Somerset Rural Youth Project	8,000	Rob Parr	8,000
District Wide Health and Well-being grants	SLAs with Actiontrack Performance Company,	20,150	Pauline Burr	2,000
	Take Art,		Pauline Burr	10,500
	Somerset Art Works		Pauline Burr	3,500
	Somerset Film.		Pauline Burr	2,000
	Total	£234,140		£230,990

Financial Implications

6. Subject to confirmation of the council's budget, all recommended allocations are in the planned service budgets for 2017/18.

Council Plan Implications

7. The funding of the district-wide organisations detailed in this report helps the Council deliver on the following values and priorities in the 2016-21 Council Plan:

Values:

Supporting people and communities, enabling them to help themselves
Working with partners to improve services, efficiencies, resilience and influence

Priorities:

- High Quality Cost Effective Services
 - Work with partners to achieve economies, resilience and influence
- Economy
 - Capitalise on our high quality culture, leisure and tourism opportunities to bring people to South Somerset
- Health and Communities
 - Target support to areas of need
 - Help people to live well by enabling quality cultural, leisure, play, sport & healthy lifestyle facilities & activities
 - Help keep our communities safe

8. The work of Access for All contributes to the Council's Equality Objectives and Action Plan.

1. Access For All

Executive Portfolio Holder: Cllr Carol Goodall, Equalities and Diversity
Directors: Rina Singh, Deputy Chief Executive
Martin Woods, Service Delivery
Assistant Directors: Helen Rutter Communities
Lead Officer: David Crisfield, Third Sector and Equalities Coordinator
Contact Details: david.crisfield@southsomerset.gov.uk (01935 462240)

Purpose of the Report

This report seeks the approval of District Executive on the the future funding of Access for All for the 2017-2018 financial year.

Background

Councillors approved a one year Service Level Agreement (SLA) with Access For All of £9,000 for the 2016-17 financial year. Monitoring of the grant has been undertaken through quarterly review meetings.

Access for All Aims:

Access for All works to improve access for all members of the community. Their aim is to increase the social inclusion of disabled people with limited mobility and other impairments, so as to enjoy equality of opportunity.

In pursuit of their charitable objectives, Access for All seeks to meet the needs of the community by:

- Improving access to public buildings, public services, education, shops, leisure facilities and the countryside
- Working for accessible public transport, dropped kerbs, improved road crossings, appropriate parking spaces and ShopMobility services
- Checking planning applications to ensure buildings are designed for inclusive living
- Providing Disability Awareness and Equalities training
- Acting as a consultee on issues of disability and access to District and Town Councils, NHS, Police, retail sector, businesses and other publicly funded charities
- Providing support, advice, guidance and a signposting service to individuals, groups and partner organisations in relation to welfare reform, disability and issues of access

Following an organisational restructuring, and with the continued involvement of new Trustees, volunteers and management, Access for All have focused their efforts on expanding their service provision and creating new funding opportunities. They have extended their bespoke Disability Awareness training, providing a service to taxi drivers. They were invited by the Somerset Library service to set up a digital inclusion support initiative for 2016-2017.

Achievements for SSSDC 2016-2017

The activities undertaken and delivered under the terms of the 2016-17 SLA include

- Supporting SSDC Officers in achieving compliance with the Equality Act 2010 and Part M Building Regulations
- Providing regular reviews of Planning and Building Control applications for public compliance with BS3800
- Sale of parking vouchers for Blue Badge holders on behalf of SSDC
- Completion of 30 Access Reviews on community facilities, plus a further 10 visits to discuss proposed schemes as they develop. Access Reviews are a key component of the process that results in the implementation of access improvements to a range of community buildings and resources
- Providing follow-up reviews and support to village and community hall committees. For example, Access for All has assisted Chilthorne Domer Recreation Club with the management of their building project so as to achieve compliance with Building Regulations Part M
- Providing bespoke access advice to SSDC teams and services, including acting as consultees on projects and planned service improvements that assist the Council meet its statutory requirements under the Equality Act 2010
- Working with the Council's Leisure service, undertaking Access Reviews of Health Walks and giving assistance with route mapping and carried out consultation with people with disabilities on the production of accessible guides
- Delivering specialist Disability Awareness training sessions for the Octagon Foyer Club volunteers
- Attending the South Somerset Equality Steering Group and other related meetings
- Reporting to SSDC on the impact of Welfare Benefit reforms on people with disabilities
- Delivery of the second annual Aspirations and Challenges event , held on the 19th January 2017, on the themes of unpaid caring and accessing sport and leisure facilities. This was attended by people with disabilities, service providers and representatives of disability campaigning groups

Additional commissioned work in 2016 - 2017

'Easy Access Guide for People with Disabilities – Places to visit in South Somerset'

A guide for visitors with disabilities in South Somerset was originally produced over ten years ago. This included access information that was self-assessed by businesses and attractions themselves on completion of a questionnaire provided by SSDC Tourism. Although this information has since been updated, it has continued to be on a self-assessment basis. As a result some details and information have been inaccurate and not met access requirements.

Consultation with Access for All and a number of south Somerset carers' groups demonstrated that to be of value, any access guide for people with disabilities should be independently reviewed by users and/or their carers, not by the businesses concerned. Independently validated information is far more effective in enabling people with varying forms of disabilities, their friends, companions and relatives to make informed choices.

Initially commissioned from Access for All in 2015/16, additional work has been carried out 2016/17 following a widening of the project scope. The revised information is now awaiting SSDC agreement on layout.

Looking Forward 2017 – 2018

If funding is approved for 2017-18 work to be covered by the SLA will include:

- Completion of project work with Tourism, Leisure and Culture Teams
- Attendance at the Equalities Steering Group
- Review of Planning and Building Control applications
- Consultation
- Disability Awareness training

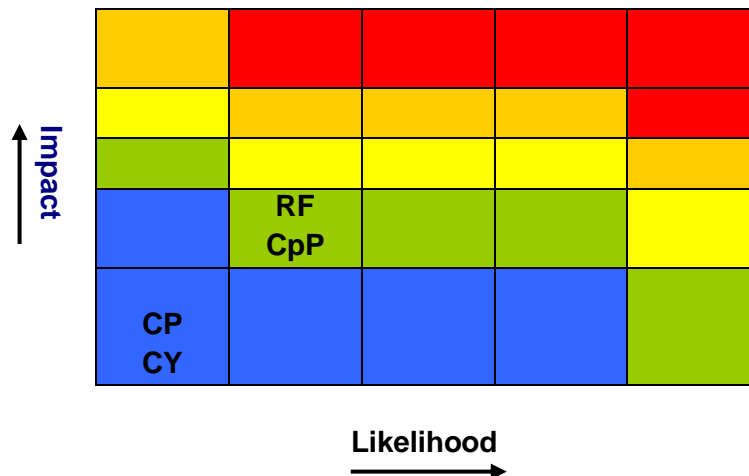
- Sale of parking vouchers for Blue Badge holders
- Access reviews and follow up of recreation spaces and community buildings
- Work with the Economic Development team to put on workshops for businesses in the tourism industry
- In association with partners, promote the new Safe Place scheme in Yeovil when it becomes available
- Begin compilation of a list of free wi-fi sites in South Somerset market towns
- Supporting the digital inclusion of disabled people through the Council’s business transformation programme by ensuring that disabled people are not disadvantaged by the increased use of digital (eg: increased use of online forms, requirement to bank online). This will require consultation and engagement with disability communities and the testing of proposed digital business solutions
- Supporting disabled clients through the implementation of Universal Credit and other welfare reforms by providing an initial assessment of clients’ needs including basic money/debt advice and form filling and, where required, referral to specialist advice agencies such as CASS and SSDC’s Welfare Advice service. Suitable training for Access for All’s Manager and other volunteers (as appropriate) will be secured through partner agencies.

Financial Implications

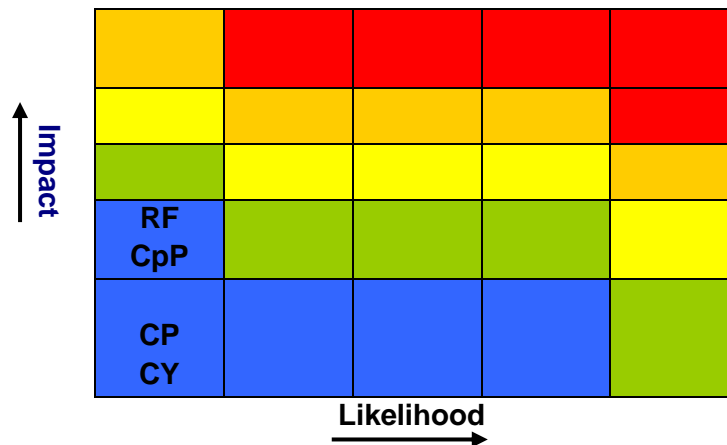
Provision for this SLA is in the 2017/18 budget for Equalities (subject to approval). If the recommended sum of £9,000 is approved, a balance of £1,000 will remain for other project work during the year.

Risk Matrix

Risk Profile before officer recommendations



Risk Profile after officer recommendations



KeyCategories	Colours (for further detail please refer to Risk management strategy)
R = Reputation	Red = High impact and high probability
CpP = Corporate Plan Priorities	Orange = Major impact and major probability
CP = Community Priorities	Yellow = Moderate impact and moderate probability
CY = Capacity	Green = Minor impact and minor probability
F = Financial	Blue = Insignificant impact and insignificant probability

Council Plan Implications

Funding Access for All assists the council to deliver on the following priorities in the 2016-21 Council Plan.

- High quality cost effective services - Work with partners to achieve economies, resilience and influence.
- Economy - Capitalise on our high quality culture, leisure and tourism opportunities to bring people to South Somerset.
- Health and Communities - Support communities so that they can identify their needs and develop local solutions; Target support to areas of need; Help people to live well by enabling quality cultural, leisure, play, sport & healthy lifestyle facilities & activities; Help keep our communities safe.

Carbon Emissions And Climate Change Implications

None

Equality And Diversity Implications

Working with the voluntary sector is one of the Council's means of providing services to hard to reach groups and engaging with communities who otherwise find it hard to access public services. Supporting Access for All helps to increase community engagement and participation and ensure compliance with our Public Sector Equality Duty under the Equality Act 2010.

Access for All provide these specific services, as SSDC is unable to do so.

2. Citizens Advice South Somerset (CASS)

Executive Portfolio Holder: Cllr Sylvia Seal, Leisure and Culture
Directors: Rina Singh, Deputy Chief Executive
Assistant Directors: Helen Rutter Communities
Lead Officer: David Crisfield, Third Sector and Equalities Coordinator
Contact Details: david.crisfield@southsomerset.gov.uk (01935 462240)

Purpose of the Report

This report seeks the approval of District Executive on the funding of Citizens Advice South Somerset (CASS) for the 2017-2018 financial year.

Public Interest

- CASS is the major provider of free, confidential, independent and impartial advice in the South Somerset area. Advice services are quality assured under the national Citizens Advice Membership Scheme
- In addition, the organisation aims to improve policies and practices that affect people's lives
- CASS has been serving the community of South Somerset since 1961

SSDC supports CASS to ensure that people across South Somerset are able to access free, impartial and expert advice; to ensure that isolated and vulnerable people in the district are able to access services fairly and not be disadvantaged by their circumstances; to ensure that policies are improved; to deliver services to some of those people most in need; to meet a range of objectives in our Council Plan.

In addition to financial support SSDC have also assisted CASS with premises, having co-located them in Petters House along with the Council's own Welfare Advice Team as a step towards creating an Information and Advice hub.

Background

At the 3 December 2015 District Executive meeting, the Council approved grant funding of £121,730 for CASS for the financial year 2016/17.

The decision to fund was taken following the outcome of an extensive review of CASS's performance that was conducted between the months of March and July 2015. The review comprised a comprehensive evaluation of CASS services and an analysis of performance data and other historical and anecdotal matters.

The following activities were undertaken as part of the review:

- i. Funding per head of population comparison against 25 other council areas
- ii. An analysis of factors with the potential to influence future information and advice priorities
- iii. Analysis of CASS's 2013/14 and 2014/15 performance data benchmarked against 7 comparator CABs and their respective funding authorities
- iv. Funding Options Appraisal

The results of the review were reported to DX at the December 2015 meeting and were instrumental in giving members the confidence to renew the funding for 2016/17.

A new CEO, Angela Kerr, joined the organisation around the time that the review commenced. Under her leadership CASS has made significant improvements in its culture, performance, volunteer recruitment & retention and development of new initiatives & projects that meet the emerging needs of South Somerset residents.

CASS Purpose

CASS is an independent charity and part of the Citizens Advice network across England and Wales. They work in partnership with other agencies and groups. CASS provides free, confidential advice to help people resolve their problems and also campaign to raise awareness about the big issues that affect people's lives. They provide advice on a wide range of issues including benefits, debt, employment, consumer, housing and family relationships. Their goal is to help everyone find a way forward no matter what problem they face.

Accessing Advice

- Walk-in sessions

Customers can attend one of CASS's walk-in advice sessions at the main office in Yeovil or at one of their outreach venues located in the following towns/venues:

Yeovil, Chard, Crewkerne, Wincanton, Ilminster, Martock, Ryalls Park Surgery

- Adviceline

A telephone help service is also provided. Customers can call 03444 88 9623 between 10:00am and 4:00pm Monday to Friday.

CASS has also joined up with the other Citizens Advice services in Somerset to improve the delivery of telephone services. When a resident from South Somerset dials the number, their local dialling code will be identified and, in the first instance, their call will be routed to Citizens Advice South Somerset. If there is no one available in South Somerset the call will go to another Citizens Advice service in Somerset.

Clients who are deaf or hard of hearing can call the Citizens Advice Text Relay service on 03444 111 445.

For consumer problems, customers can access the National Citizens Advice consumer helpline on 03454 04 05 06. The helpline is open Monday to Friday 9:00am to 5:00pm.

- Email

Advice can also be received via email through completion of an online inquiry form. CASS aim to respond to email enquiries within 3 working days. However, if a client's questions require more complex advice, they will be invited to attend one of the walk-in sessions at the Yeovil office or at one of the outreach locations.

- Skype

CASS is running a pilot project using Skype for clients in the Somerton area.

- Self-serve

Clients with access to the internet may be able to self-serve by finding the information they require on the Citizens Advice website at: www.citizensadvice.org

- Debt drop-in sessions

CASS also holds debt specialist debt drop-in sessions, with a specialist debt adviser, at their Yeovil office on the last Thursday of every month between 10:00am and 1:00 pm.

Summary of Service Achievements

2015/16

The last full year for which there are figures is 2015/16. The following is a summary of key performance achievements from that year.

- CASS saw a **15% increase** in the number of clients they helped compared with the previous year.
- **5,743** clients helped across the organisation in general advice, casework and special projects
- **18,507** advice issues dealt with
- **26,271** client contacts
- **£1.5 million** debt rescheduled & managed
- **2,464** clients helped with Benefits and Tax Credits enquiries
- **909** clients helped with debt
- **643** clients assisted with money skills and personal budgeting
- **78** clients received energy advice
- **59** clients received Surviving Winter grants
- **173** clients awarded Local Assistance Scheme grants with **152** children in families helped
- **209** fuel & food parcels awarded with **78** children in families helped
- An **11%** increase in volunteers over the year with **40** volunteers active in advice roles
- Over **7,900** hours of volunteer time with an estimated value of **£75,000**
- Delivered over **1,000** hours of free training

2015/16 Impact

At the point of engaging with CASS nearly **3 in 4** clients said their issues caused difficulties in other parts of their life eg:

- **2 in 3** clients felt stressed, depressed or anxious
- Nearly **1 in 3** had less money or escalating financial difficulties
- Nearly **1 in 3** felt their physical health had got worse

Following receipt of a service **4 in 5** clients said CASS improved their lives e.g.:

- **4 in 5** felt less stressed, depressed or anxious
- **1 in 2** had more money or control over their finances
- Nearly **1 in 2** said their physical health had improved

2016/17 Performance

A 6-month contract monitoring meeting was held with the CEO and Chair of Trustees of CASS on the 13th October 2016. There was also a pre-meeting held with Leader Cllr Ric Pallister and Portfolio Holder Cllr Sylvia Seal.

Performance information for the first 6 months of 2016/17 has also been provided to members through a series of presentations to Area Committees in November 2016 and January & February 2017.

Delivery of the SLA requirements has been good with more than satisfactory performance over the first 9 months of the 2016/17 financial year.

The following table provides a comparison of performance data from quarters 1 to 3 of 2016/17 with the corresponding three quarters from 2015/16. For illustrative purposes a sample of performance data has been presented here from what is otherwise an extensive suite of reporting requirements.

As can be seen from the table, benefits and debt are by far and away the 2 biggest issues that CASS deals with and Area South returns the largest number of clients.

The number of 'Gateways' (initial contacts) by telephone has dropped significantly compared with last year. CASS has also reported that the percentage of calls answered is currently 46%.(although this changes monthly dependant on demand and performance). This is in no small part due to the introduction of the Somerset Adviceline¹ service, which is not working as effectively as it was originally planned. This is not unique to CASS however and to illustrate the wider problem, Mendip CAB now has to fund an additional 20 hours of dedicated call centre staff to increase their call handling rate. Furthermore, too many non-advice related enquiries are coming via the telephone. CASS is not being complacent about the issue and are exploring if, and how, technology can be used to filter out the non-advice related calls.

Members will also notice that in some areas client volumes have reduced when compared with 2015/16. However, lower volumes aren't necessarily associated with a dropping off in performance. Clients are increasingly presenting with more complex cases with a multiplicity of issues, which are taking volunteer advice workers significantly longer to resolve.

Other notable service achievements in the first 9 months of 2016/17 include:

- A successful staff restructuring driven by a focus on improving frontline services
- The introduction of the new Citizens Advice membership scheme with monthly monitoring by Citizens Advice nationally
- The introduction of a new locally agreed Customer Charter setting out clearly the quality of service that clients can expect
- The overall increase in clients seen
- More effective use of volunteer advice workers' time through the introduction of Casework Supervisors in Petters House reception to triage clients and filter out those not needing advice
- Improved customer access via outreach services in Chard, Crewkerne, Ilminster, Martock and Wincanton and the Skype pilot for clients in the Somerton area
- Improved partnership working with SSDC Welfare Advice service
- A consistent increase in the number of volunteers recruited and retained

Given the limitations of using only quantitative data for performance monitoring, it has been discussed and agreed that the suite of reporting requirements will be reviewed when drawing up the 2017/18 SLA ensuring that the statistics required are useful and add value. We will also look at much greater use of qualitative outcomes and narrative that better demonstrate the work of CASS and its impact on people's lives.

¹ Adviceline' is a networked telephone system where callers, if unable to get through to their local bureau, are routed to the next available bureau within the network, which for the Somerset Adviceline will be the other Somerset CABx.

	2015/16			2016/17		
	Q1	Q2	Q3	Q1	Q2	Q3
Overall Totals						
Number of clients helped funded by Core Funds	1042	159	1227	1289	1346	1224
Number of new enquiries	263	368	444	466	497	380
Number of activities	3337	4280	5377	5378	5779	4911
Number of issues	1897	4934	3312	3355	3308	2462
No of Issues by advice area						
Benefits	625	777	1099	1326	1244	1049
Consumer	77	115	122	115	99	91
Debt	437	729	778	617	686	437
Discrimination	2	10	27	19	18	12
Education	7	12	7	10	19	10
Employment	175	296	306	304	302	192
Financial services and capability	54	100	134	130	143	94
Health and community care	16	19	49	45	47	24
Housing	172	247	259	299	236	187
Immigration and asylum	20	14	11	16	24	6
Legal	98	90	120	111	123	84
Other	-	12	32	33	21	14
Relationships and family	17	203	265	231	251	181
Tax	146	20	28	28	39	37
Travel and transport	29	14	22	37	17	14
Utilities and communications	8	48	53	34	39	30

Number of clients assisted by outreach by District area						
Crewkerne	21	14	16	14	16	16
Chard	38	25	37	57	75	60
Wincanton	20	10	30	60	46	47
Ilminster	19	14	18	19	14	12
Martock Job Club	-	-	-	12	12	11
Somerton	-	-	-	1	17	7
Ryalls Park Medical Centre	-	-	-	2	15	9
Gateways* by advice channel						
In person	383	377	391	446	470	406
Telephone	412	475	416	364	352	364
Letter/fax	4	2	4		4	2
Email	80	78	66	57	52	48
Clients by District area						
Area North	98	83	101	108	143	133
Area East	101	102	108	156	162	116
Area South	350	451	436	473	478	421
Area West	185	184	200	129	236	213
Home Visits by district area						
Area North	17	28	7	11	6	6
Area East	28	8	9	13	4	5
Area South	33	37	32	26	18	15
Area West	31	28	16	9	3	8

Resources						
Core Staff fte's	6.6	6.6	6.6	6.6	6	6
Volunteers	36	41	45	42	45	49
Increasing the percentage of phone calls answered (less abandoned calls)	Baseline	Target	Progress	Baseline	Target	Progress
	32%	70%	27%	32%	60%	34%
Increasing the number of active volunteers	Baseline	Target	Progress	Baseline	Target	Progress
	22	60	40	40	60	47

- Gateway is the system of triaging clients

Funding Beyond 2017/18

The Council's relationship with its core funded voluntary sector partners (CASS and SPARK) is likely to change in the context of SSDC's Business Transformation programme and the ongoing requirement to achieve budget savings. It is proposed therefore that 2017/18 will be a transitional year during which a review into how SSDC will continue to support and work with CASS will be carried out. A report detailing the outcomes of the review along with recommendations will be brought back to members in a report to DX in the autumn 2017.

Financial Implications

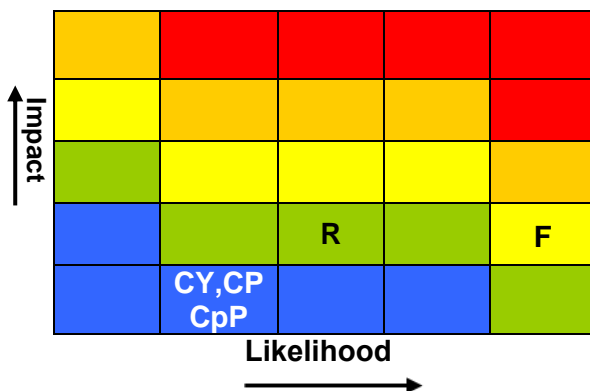
CASS has set a balanced budget for the 2017/18 financial year.

At the 13 October 2016 meeting with Cllr Ric Pallister and Cllr Sylvia Seal, it was advised that funding for 2017/18 would be at the same level as 2016/17, subject to District Executive approval.

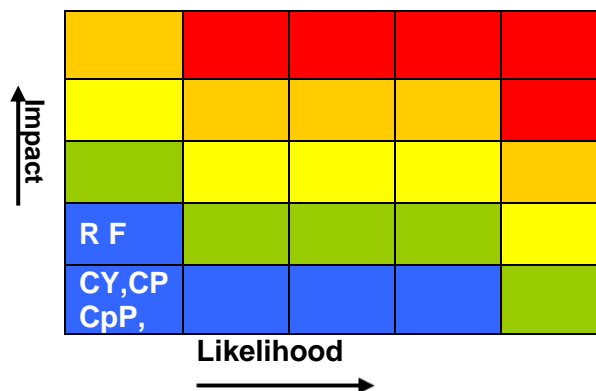
If the recommended budget allocation of £121,730 is agreed, all funds in the CASS budget will be committed for 2017/18.

Risk Matrix

Risk Profile before officer recommendations



Risk Profile after officer recommendations



Key

Categories	Colours (for further detail please refer to Risk management strategy)
R = Reputation	Red = High impact and high probability
CpP = Corporate Plan Priorities	Orange = Major impact and major probability
CP = Community Priorities	Yellow = Moderate impact and moderate probability
CY = Capacity	Green = Minor impact and minor probability
F = Financial	Blue = Insignificant impact and insignificant probability

Council Plan Implications

Funding CASS assists the Council deliver on the following values and priorities in the 2016-21 Council Plan:

Values

- Supporting people and communities, enabling them to help themselves
- Work with partners to achieve economies, resilience and influence

Priorities

- Target support to areas of need
- Actively manage assets and resources to ensure the best financial or community return
- Enable people to live independently for as long as they are able

Carbon Emissions And Climate Change Implications

CASS aim to deliver their services at a place convenient to the client. Financial management advice can include energy efficiency measures.

Equality And Diversity Implications

Working with the voluntary sector is one of the Council's means of providing services to hard to reach groups and engaging with communities and individuals who otherwise find it hard to access public services. CASS delivers services to some of the most vulnerable people in the district. Services are free and are provided to all regardless of age, race, gender, sexual orientation, religion. CASS has an adopted Equalities Policy.

Privacy Impact Assessment

None

Background Papers

- CASS report to DX December 2016
 - CASS presentation to Area North Committee 23 November 2016
 - CASS presentation to Area South Committee 30 November 2016
 - CASS presentation to Area East Committee 11 January 2017
 - CASS presentation to Area West Committee 15 February 2017
-

3. SPARK

Executive Portfolio Holder: Cllr Sylvia Seal, Leisure and Culture
Strategic Director: Rina Singh, Deputy Chief Executive
Assistant Director: Helen Rutter Communities
Service Manager: Helen Rutter, Communities
Report Author: David Crisfield, Third Sector and Equalities Co-ordinator
Contact Details: david.crisfield@southsomerset.gov.uk (01935 462240)

Purpose of the Report

This report seeks the approval of District Executive on the future funding of SPARK –Somerset (previously South Somerset Voluntary and Community Action) for the 2017/2018 financial year.

Public Interest

SSDC supports SPARK to ensure that:

- a) Voluntary, community and social enterprise organisations (VCSE) across South Somerset are able to access free, impartial and expert advice from within the sector.
- b) The voluntary community and social enterprise sector is properly represented,
- c) There is a development body that promotes the need for and ways of delivering, services in the sector, to help some of the people most in need
- d) A range of objectives in our Council Plan are met

Background

Set up in 1981, SPARK is part of a national network of Councils for Voluntary Service (now commonly called Voluntary & Community Action) that traditionally have existed at a District level. These are civil society, development organisations whose main purpose is to support the work of other organisations in the VCSE. This type of organisation is also known as VCSE Infrastructure. It is a registered charity and company limited by guarantee.

Its role includes:

- Representing the views of members to statutory bodies and others
- Helping new initiatives to develop and new organisations to form
- Providing advice and information on all aspects of running and managing the organisations they work with, including recruiting volunteers and accessing sustainable funding or generating income
- A leadership role within the sector, encouraging organisations to work together in collaboration and partnership

SPARK has worked closely with our Financial Services team to provide evidence of the organisation's ongoing sustainability for both its core activities and its direct services.

At the 4 February 2016 District Executive, grant funding of £74,260 was approved for SPARK for 2016/17. The decision to fund followed the outcome of a review of SPARK's performance that was conducted between the months of March and December 2015.

The purpose of the review was to inform the council's priorities in relation to the voluntary sector's support needs and to establish how this will be funded from the 1st April 2016.

It was carried out with the full co-operation of, and in close collaboration with, SPARK's trustees and staff.

The results of the review were reported to DX at the December 2015 meeting and were instrumental in giving members the confidence to renew the funding. In February 2016, a new Outcomes based Service Specification was drawn up for 2016/17 against which SPARK's performance has been monitored.

SPARK Activities 2016/17

2016/17 has been marked by a significant upturn in SPARK's profile and ability to support South Somerset's voluntary and community sector. Under the leadership of the new manager SPARK has been driving forward with a programme of service improvements whilst also seeking out new business and therefore diversifying their income streams to supplement our core funding.

- 1) Following the takeover of Mendip Community Support (SPARK's equivalent organisation supporting the VCS in Mendip and Sedgemoor) a full rebranding exercise was undertaken, with what had been SSVCA's Voluntary Sector Support Service now becoming SPARK, to better reflect its now expanded area of benefit.
- 2) As part of the rebranding SPARK has significantly improved its communication with and offer to the local VCS. Of particular note are the new website, much improved e-bulletins and recent addition of a range of training courses.
- 3) **Website** - SPARK now has a brand new, fresh and intuitive website with a vastly improved range of information and resources available to groups and organisations. Further improvements are in hand including the provision of a library of downloadable resources such as model constitutions, policies and other fact sheets. <http://www.sparksomerset.org.uk/>
- 4) **Weekly e-bulletins** – comprising of an alternating Funding Bulletin and General Bulletin, these provide current sector news and information on legislation, funding, events and opportunities for local VCS organisations. They also provide a vehicle for local groups to promote and profile their own events and services. These regular bulletins are supplemented with other emails, surveys and more targeted reminders or campaigns. The overall effect is that the sector receives regular, consistent and high quality information from SPARK placing them as the organisation of choice for support needs in South Somerset.

"Thank you very much for such a useful funding bulletin. I really appreciate the 'at a glance' format. From the talk on funding we know how important it is to go in by the funder's door, rather than trying to drag them through our door."

- 5) **SPARK Training** - Introduced in the late autumn of 2016, SPARK has now been running a series of very well attended training courses for trustees and staff of local groups. Courses have been arranged to meet the needs expressed by local groups and cover both issues of governance and day to day operational practice. Topics(past and future) include:-
 - Budgets, management accounts and cash flow forecasting
 - Data Protection for fundraisers
 - DBS (Safeguarding)
 - Writing good funding applications

- Preparing Annual Reports
 - First Aid
 - E-marketing and newsletters
 - Introduction to Social Media
- 6) **DBS** - With the acquisition of Mendip Community Support, SPARK is now able to offer groups and organisations in South Somerset a full DBS checking service. As a 'Registered Body' with the Disclosure and Barring Service, Spark can;
- Offer dedicated support to deal with queries by phone, email or in person
 - Check completed applications and send them to the DBS.
 - Monitor and track all applications on an applicant's behalf and notify them when the Disclosure has been released.
 - Provide training on request, helping groups complete their applications ensuring a smooth process from start to finish.

The DBS service is a significant addition to SPARK's portfolio of services meaning that South Somerset groups are now able to benefit from an enhanced service.

"Compass Disability Services is an employer of over 50 staff and provider of independent living services. We have a need for a reliable, professional and cost effective DBS service. We have worked with Spark over the past four years to provide this service and continue to be very happy that our needs are being met."

- 7) **Volunteering** – SPARK continues to provide support for individual volunteers and volunteer seeking organisations across South Somerset. They promote available volunteering opportunities via the national Do-it website, through their own database, on the website, in the local press and also through their social media channels.

In addition to the brokerage service SPARK also provide best practice advice and guidance to the volunteer involving organisations registered with them. These services include policy writing, recruiting, retaining and managing volunteers. They also facilitate Volunteer Coordinator meetings, where groups come together to network, share and support each other.

Planned improvements to the volunteering brokerage service include the introduction of a brand new bespoke searchable volunteer database that will provide a much more effective local tool than either their existing offer or the Do-it website. This new database will also enable them to gather much better performance management data on the Volunteering service. This is due to go live in March 2017.

The Volunteer database is part of an overarching new Customer Relationship Management (CRM) tool that Spark are introducing that will enable them to better capture and report every business interaction they have with their users.

SPARK is also developing 'place based' local volunteering brokerage. A bespoke service is being developed in Frome and funded by Frome Town Council. Similar opportunities are also being explored in South Somerset.

- 8) **Group support** - this is provided by the dedicated Voluntary Sector Advisers. They are the initial point of contact for groups and organisations needing information, advice or support and can advise on anything from starting up a community group through to achieving long-term sustainability. Support includes providing free organisational 'health checks' and advising on

the best way forward. The adviser can also help groups navigate and access the other SPARK services which they may require e.g. recruiting volunteers, free funding searches and DBS.

To ensure that the Group Support work SPARK undertakes complements rather than duplicates the work of our Area Development Service, SPARK's manager has met with each of the Area Development Teams, clarifying SPARK's particular areas of focus and specialism and enabling cross referral between our two organisations as appropriate.

The following four brief examples illustrate well the variety of groups SPARK work with and range of issues around which they can provide support.

Henhayes Centre - Crewkerne

In the summer of 2016 SPARK had a series of meetings with the Henhayes Centre in Crewkerne to discuss their future financial viability and governance arrangements. As a result of these meetings, they worked with Henhayes in submitting a bid to the Somerset Community Foundation. This bid was successful and provides The Henhayes Centre with a resource to look at a review of current governance arrangements, and a major funding bid for a Project and Fundraising Officer. SPARK continues to provide support to the Henhayes Centre in these areas.

Yeovil ADHD Group

In January 2017 SPARK met with representatives of Yeovil ADHD. The group wanted advice on delivering a regional conference in terms of marketing and funding. They were able to provide this support and - as a result - the conference will be held in the spring of this year. From this initial contact SPARK is now in discussion with Yeovil ADHD about providing further support.

Stoke Hill Farm - Wincanton

Stoke Hill Farm is a small working farm just outside Wincanton. The owner wants to be able to open up the farm for environmental education purposes to school children and specific groups of adults. SPARK has had various meetings with the owner throughout 2016/17 and has provided support on fundraising, legal structures, networking and marketing. The farm has recently been successful in securing some funding and SPARK are working with them and English Nature for Science Week in March 2017.

Iminster De Fib Group

SPARK provided support to a new group in Iminster who have been fundraising to provide a defibrillator for the town. SPARK provided practical support to them including advice around setting up a new group and establishing their Constitution and good governance.

"Spark has signposted volunteers to us, provided mentoring, chaired meetings to offer advice or guidance, and promoted our work at various functions. They've even got us national coverage in the printed press through their extensive social networking! This barely touches on the help they've provided over the years too. On top of being a valuable resource, the team have proven themselves to be personable and friendly. There is a genuineness to their 'want to help' that is quite rare. Their service is invaluable and one we can't recommend enough."

- 9) **Networking** – SPARK provide opportunities for groups and organisations to come together to learn, network and explore the opportunities to work together more collaboratively. It achieves this through a programme of thematic VCS Forums. Forums themes have included, the importance of values, business planning, funding applications and opportunities, DBS as well as guest speakers from Children in Need, Somerset Community Foundation and the Lottery

"The Forums are very well organised and informative, a great way to network – not sure what you could do better!"

- 10) **Accountancy Services** – this is a new service currently in development which is being created in response to a need articulated by a number of smaller groups. SPARK will employ a community accountant who can prepare statutory and management accounts, provide a book keeping and payroll service and offer advice and support on a wide range of financial good practice as it affects charities and the wider voluntary sector. This will be a service offered on a paid for, but affordable basis. The post will also provide SPARK with its own bookkeeping and financial management requirements thus achieving savings on their management costs.

In addition to these core activities SPARK have also been involved in the following during the course of the year.

- Negotiating and securing funding from Symphony and the IPC to fund a Community Partnerships Coordinator post, which is helping to bridge the gap between health and the voluntary sector
- Organising jointly with SSDC the South Somerset 'Let's End Loneliness' conference.
- With the Community Council for Somerset and Engage, successfully bidding to the Transform Foundation for an £18k grant to develop a new website that will provide a single point of access (a portal) for any group or organisation in Somerset that is seeking help and support. It will be called '**Make it Happen**' and will direct individuals and groups to the infrastructure organisation best placed to help them, based on geography or their particular needs. This is anticipated to drive more business to SPARK.
- Partnering with other local organisations, SPARK are in the process of bidding for two County-wide contracts, that will support and complement their core business
- Partnering with Somerset Rural Youth Project to look at how they can support the National Citizen's Service.

In their role as providing a 'Voice for the Sector' SPARK also engages in strategic arenas on behalf of the sector, for example,

- with the CCG at board level regarding their future commissioning intentions;
- In discussions with Yeovil Hospital regarding the role the VCSE can play in supporting early hospital discharge;
- Key member of the County-wide VCSE Strategic Advisory Group
- Engagement with the Office of Civil Society (DCLG) and Somerset Chamber of Commerce to discuss the development of employee supported volunteering, and
- Supporting SCC in community engagement events across the Districts, to improve communication and develop better ways of working between the statutory and voluntary sectors, particularly in relation to commissioning.
- As a member of the SST Strategy Group and as Chair of the SST Healthy Communities group

State of the Sector Survey and Report

One of the key requirements of the 2016/17 SLA has been the production of a South Somerset 'State of the Sector' report to inform SPARK's future service planning and to include:-

- An analysis of sector's economic impact
- An analysis of the sector's health and needs

Through membership of the Somerset VCSE Strategic Forum, an opportunity presented itself to undertake this research as part of a county-wide Health of the Sector project. In addition financial

contribution from SSDC's core grant to SPARK, match funding was made available by the Somerset Community Foundation, Community Council for Somerset and Somerset County Council.

The findings from this research will help inform the review of our working and funding relationship with SPARK that we are proposing takes place during the 2017/18 financial year.

'Share, Celebrate, Grow - VCSE State of the Sector Report 2016'

Summary of key findings

A diverse sector – with gaps

- 130 organisations, with a diverse range of charitable purposes, contributed to the survey; one third of these operate in South Somerset.
- 68% of respondents are 'micro' and 'small' organisations
- 47% of respondents (the largest category) provide social, recreation and leisure services; by contrast 0.9% and 1.8% respectively provide immigration and child care services
- Gaps: Young people, people with mental health problems, and those on low incomes were identified as groups for whom services are currently inadequate

Rich in optimism and in commitment to meeting needs...

- 19% expected the current year's income to exceed that of the previous year, 46% expected it to be about the same
- 48% plan to maintain their level of services in the coming year while 35% plan to increase their level of services
- 61% are currently working in partnership with other organisations, and more plan to do so. Key reasons - alongside improving services - include cost savings, efficiencies and increasing funding opportunities

...but many on a 'sustainability knife-edge'

- 59% said the volume of demand for their services has increased,
- 42% said the complexity of issues faced by clients has increased and 39% said it had stayed the same
- 76% expect their income to remain 'about the same' or to decrease during 2016-17
- 43% expect to break even financially during the current year, 25% expect their outgoings to exceed their income
- 52% said the availability of funding has decreased over the past three years,
- 65% said that 'funding and sustainability' are priority areas for training and support
- Parish and town councils are key to the sustainability of many local community groups and charities.

Funders' priorities are proving counter-productive

- Core running costs are the most difficult to raise - severely limiting fund-raising capacity. 61% put salaries at the top of the list of funding-raising challenges
- 78% put funding and sustainability at the top of 4 main challenges facing them in the next 2 years;
- 65% (84) of organisations have no paid full-time workers, 24 of these have 1 or 2 part-time workers
- 32% of all respondents are operating with no paid staff at all

Members may be concerned that by now working across 3 Districts this could dilute Spark's focus at the South Somerset level. This however has to be set against both the added value this brings (e.g. the addition of the DBS service brought about by taking on the services of Mendip Community Support) and their ability to sustain a viable service by achieving economies of scale. By monitoring

delivery against targets we are safeguarding our investment, whilst also opening up possibilities to work with them differently as Transformation is implemented.

Performance Monitoring

Under the terms of the Service Level Agreement Performance monitoring is undertaken twice a year through submission of a 6 monthly report and a formal review meeting.

The interim 6 month contract monitoring meeting was held with the Manager and Chair of Trustees of SPARK on the 14th November 2016.

The following table provides a comparison of performance against the SLA requirements in the financial year 2015/16 with the first six months of the 2016/17 financial year. For illustrative purposes a sample of performance data has been presented here from what is otherwise an extensive suite of reporting requirements. Due to the introduction of a new Service Level Agreement for 2016/17 direct comparisons are not available in all cases.

As SPARK are currently in the process of migrating all their performance data to their newly procured CRM, this has prevented us from presenting more up to date data than that produced for the six monthly reporting requirements.

As a requirement of their 2016/17 SLA, SPARK has developed a methodology to be able to better report the impact of their work. It is proposed, therefore, that SPARK is invited to attend Area Committees in 2017 to present on their work and how it benefits the sector in South Somerset.

Given the limitations of using quantitative data for performance monitoring, the current suite of reporting requirements will be reviewed when producing the 2017/18 SLA ensuring that the monitoring requirements are useful and add value. Along with the improved management data that SPARK's new CRM will be able to provide, we will also look at much greater use of qualitative outcomes and narrative that better demonstrate the work of SPARK and its impact on people's lives.

Work Area	2015/16	Comments	2016/17 Half Year	Target (Where relevant)	On Target RAG	Comments
Group Support	34 groups	<p>Areas covered include</p> <ul style="list-style-type: none"> • setting up a charity, • constitutions • organisational policies • funding • volunteering • governance • HR • PR and marketing. <p>New groups that were helped to start-up included</p> <ul style="list-style-type: none"> • mental health group • three Arts groups • Men in Sheds (tackling loneliness and isolation amongst older men) • special educational needs group • self-help group for service families 	32 groups supported	50 groups supported	G	<p>Of these,</p> <ul style="list-style-type: none"> • 3 requested specific funding advice and the remainder required more general support, including advice on start-up, governance and volunteers.
Networking & Training events	<p>4 VCS Forums</p> <p>2 training events</p>	<p>112 participants in total across all 6 events.</p> <p>95% of participants rating the forums and training events as useful</p>	<p>4 VCS forums</p> <p>Launched a new Training Programme with sessions planned for December and January</p>	<i>Minimum of 6 opportunities provided for the sector to develop knowledge and skills</i>	G	<p>60 participants. 100% of participants rating them either excellent or good</p> <p>Sessions on</p> <ul style="list-style-type: none"> • DBS • Funding Applications • Budgets, management accounts & cash-flow • Introduction to Facebook and Twitter

Work Area	2015/16	Comments	2016/17 Half Year	Target (Where relevant)	On Target RAG	Comments
Information & Communication	128 e-bulletins published and circulated	Bulletins provide information, advice and guidance on a self-serve basis. 100% of recipients indicated that they found the e-bulletins useful.	63 e-bulletins published and circulated New website soft launched	<i>Minimum of 24 e-bulletins published</i> <i>Website launched by July 2016</i>	G R	Bulletins now alternate weekly between a funding bulletin and more general bulletin Website delayed due to take over of Mendip Community Support & rebranding exercise
Volunteering	432 new volunteers seeking volunteering opportunities registered. 84 volunteers successfully placed		148 new volunteers seeking volunteering opportunities registered 28 volunteers successfully placed	<i>450 volunteers registered</i> <i>100 volunteers placed</i>	R R	Volunteering figures have been significantly down in this period due mainly to organisations using the 'Do It' national volunteering website. However, this trend is now reversing as the Do It offer is unable to deliver the service organisations require. In response a bespoke volunteer database is being developed for South Somerset based on a successful system developed in Plymouth that has led to a 100% increase in enquiries. SPARK is also developing 'place based' local volunteering brokerage. Following an initiative in Frome, and funded by Frome Town Council, similar opportunities are also being explored in South Somerset.

Work Area	2015/16	Comments	2016/17 Half Year	Target (Where relevant)	On Target RAG	Comments
Volunteering cont'd	<p>122 new volunteering opportunities with volunteer seeking organisations registered</p> <p>35 new volunteer seeking organisations with volunteering opportunities registered</p>		<p>39 new volunteering opportunities with volunteer seeking organisations registered</p> <p>13 new volunteer seeking organisations with volunteering opportunities registered</p>	<p>110 <i>Volunteering opportunities registered</i></p> <p>50 <i>new volunteering organisations registered</i></p>	<p>R</p> <p>R</p>	Volunteering figures have been significantly down in this period due mainly to organisations using the 'Do It' national volunteering website. However, this trend is now reversing as the Do It offer is unable to deliver the service organisations require. In response a bespoke volunteer database is being developed for South Somerset based on a successful system developed in Plymouth that has led to a 100% increase in enquiries.
	3 Volunteer managers peer support sessions run.		<p>Held 4 volunteering promotional events</p> <p>2 Volunteer co-ordinators peer support sessions run.</p>	<p><i>Up to 4 local volunteering promotional events held.</i></p> <p><i>Facilitate up to 4 volunteer managers meetings</i></p>	<p>G</p> <p>G</p>	SPARK continues to work closely with CHAC to provide support to their volunteers on a weekly basis.

Work Area	2015/16	Comments	2016/17 Half Year	Target (Where relevant)	On Target RAG	Comments
Impact	Secured £6k		Worked with regional Infrastructure organisation, South West Forum, to Develop methodology to report impact of work.	<i>Impact report presented to SSDC District Executive Committee</i>	G	Impact report will form part of the SPARK final end of year report (anticipated May 2017) and will be reported to members later in 2017.

Funding Beyond 2017/18

The council's relationship with its core funded voluntary sector partners (SPARK and CASS) is likely to change in the context of SSDC's Business Transformation programme and the ongoing requirement to achieve budget savings.

It is proposed therefore that 2017/18 will be a transitional year during which a review into how SSDC will continue to support and work with SPARK will be carried out.

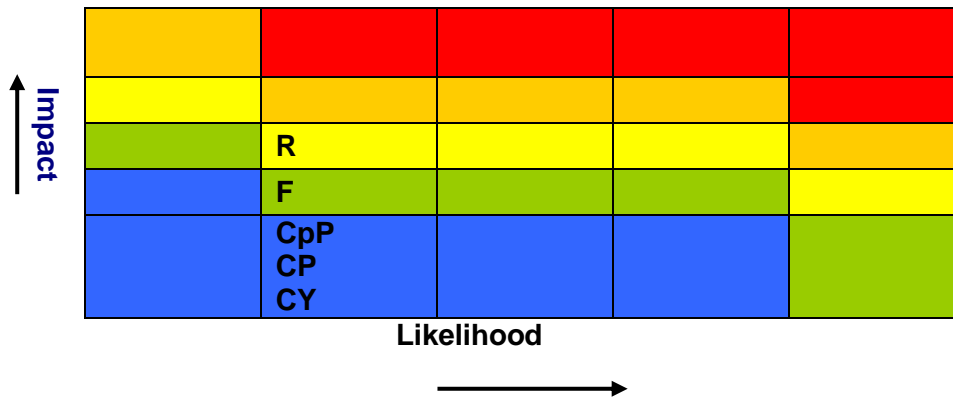
A report detailing the outcomes of the review along with recommendations will be brought back to members in a report to DX in autumn 2017.

Financial Implications

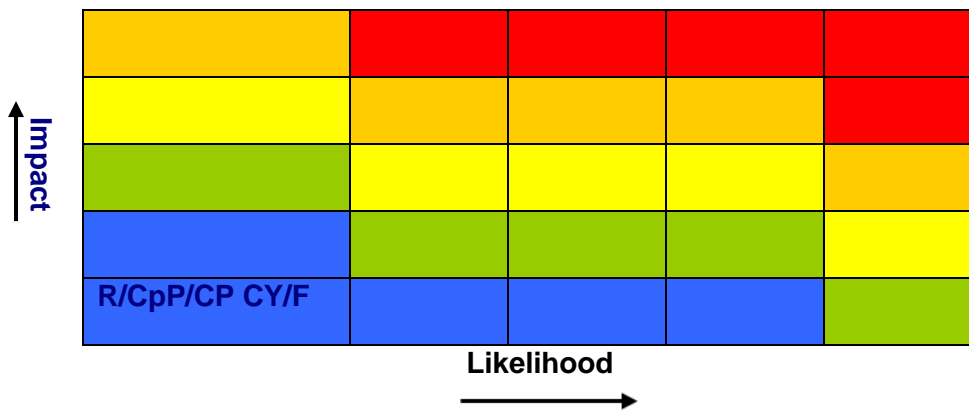
If the budget allocation of £74,260 recommended is agreed, all funds in the SPARK budget will be committed for 2017/18.

Risk Matrix

Risk Profile before officer recommendations



Risk Profile after officer recommendations



Key

Categories	Colours (for further detail please refer to Risk management strategy)
R = Reputation	Red = High impact and high probability
CpP = Corporate Plan Priorities	Orange = Major impact and major probability
CP = Community Priorities	Yellow = Moderate impact and moderate probability
CY = Capacity	Green = Minor impact and minor probability
F = Financial	Blue = Insignificant impact and insignificant probability

Council Plan Implications

Funding SPARK assists the council deliver on the following values and priorities in the 2016-21 Council Plan.

Values

- Working with partners to improve services, efficiencies, resilience and influence.
- Supporting people and communities, enabling them to help themselves.

Priorities

- Actively manage assets and resources to ensure the best financial or community return.
- Support communities so that they can identify their needs and develop local solutions.
- Work with partners to achieve economies, resilience and influence.

Carbon Emissions & Adapting To Climate Change Implications

None

Equality And Diversity Implications

Working with the voluntary sector is one of the Council's means of providing services to hard to reach groups and engaging with communities who otherwise find it hard to access public services. Supporting the VCSE increases community engagement and participation. All groups supported by SSDC are required to have an Equalities Policy

4. Somerset Rural Youth Project

Executive Portfolio Holder: Cllr Sylvia Seal, Leisure and Culture
Directors: Rina Singh, Deputy Chief Executive
Assistant Directors: Steve Joel, Health and Well-Being
Service Manager: Lynda Pincombe, Community Health and Leisure Manager
Report Author: Stephen Barnes, Play & Youth Facilities Officer
Contact Details: stephen.barnes@southsomerset.gov.uk (01935 462408)

Purpose of the Report

The purpose of this report is to update the Committee, of the work being delivered by Somerset Rural Youth Project in the rural communities of South Somerset over the past year.

Public Interest

The Somerset Rural Youth Service (SRYP) is a well-established organisation working across the county.

This report sets out the SRYP work over the last year, which has been directly aided by the grant SSDC provides.

Background

The Somerset Rural Youth Project (SRYP) is a voluntary youth work charity working with young people aged 11-25 in rural Somerset. Through this work they;

- Provide individual young people with advice and support
- Offer a wide range of volunteering opportunities
- Support young people's involvement in their community
- Provide access to and participation in positive activities

SRYP have a vision of a Somerset where rural young people feel a sense of belonging, a willingness to contribute and a future that is not limited by access to opportunities and services.

SSDC & SRYP signed a 1-year funding (value £8,000) and Service Level Agreement on 6th May 2016. The agreement sets out that SSDC and SRYP will work in partnership to provide additional services that will provide stimulating things to do and places to go, target those who are disadvantaged, encourage positive contributions and supporting choices for young people living in rural areas of South Somerset.

Report

With SSDC funding and a SLA in place the Somerset Rural Youth Project have been actively working over the past year, with young people in areas of South Somerset. A summary of this work is provided below.

Work in Communities

The following table provides a snapshot of their work in communities over the last year.

Community	Activities	No. of Young People Involved in Organising / Partaking In	Partners
Yeovil	<i>Two summer fairs at Westfield & outside St Johns Church</i>	18	<i>Local Community</i>
District Wide	<i>Fund Raising £1,600</i>	25	<i>Benefiting local charities including Happy Landings, Mind, 2BU and Time is Precious</i>
Hendstridge, Wincanton, Ilchester and Yeovil	<i>Four Youth Days Planned and Delivered</i>	700	<i>Town/Parish Councils, Local Volunteers, SSDC</i>
District Wide	<i>Music Project</i>	35	<i>SSDC Gold Star Event and local communities</i>
District Wide	<i>Health Watch Project</i>	23	<i>Various Young People</i>
District Wide	<i>National Citizen Service (NCS) programme</i>	99	<i>Various from several communities</i>

Performance against SLA Targets

The following table sets out SRYP performance against the targets set out in this years SLA.

Annual Goal	PI/Measure	Target 2015/16	Performance to Date
To encourage young people to be involved in the development of youth initiatives within their communities	• No of communities involved	4	23
	• No of Young People involved	100	108
Increase the number of disadvantaged young people participating in leisure opportunities	• No of young people taking part in diversionary activity schemes increased by 25%	60	99 young people took part in a variety of projects across South Somerset

Annual Goal	PI/Measure	Target 2015/16	Performance to Date
Deliver 4 Youth Days with local community support, encourage youth participation	<ul style="list-style-type: none"> Delivery of 4 Youth Playdays in Summer Holidays 2016 in partnership with SSDC and others 	4	Four Youth Days delivered at Henstridge, Wincanton, Ilchester and Yeovil.
Participation at Youth Days	<ul style="list-style-type: none"> A minimum number of young people to attend all 4 of the Youth Days 	200	An estimated total of 700 young people attended Youth Days.

Next Steps

The work of SRYP is highly valued and continues to support young people in our South Somerset communities. Subject to the resolutions of this committee, officers would seek to agree and enter into a new SLA with the SRYP for a further 12 months.

Council Plan Implications

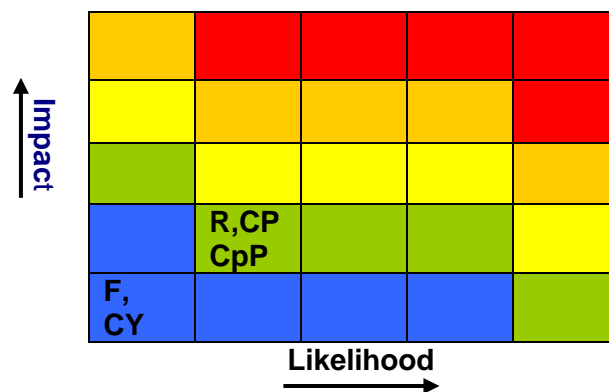
Supporting SRYP will contribute towards the 2016-21 council plan priorities as follows:

Health & Communities

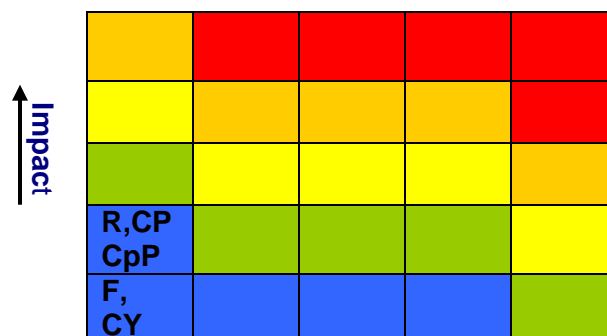
- Help people to live well by enabling quality cultural, leisure, play, sport & healthy lifestyle facilities & activities.
- Help keep our communities safe

Risk Matrix

Risk Profile before officer recommendations



Risk Profile after officer recommendations



Key

Categories	Colours (for further detail please refer to Risk management strategy)
R = Reputation	Red = High impact and high probability
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CP = Community Priorities	Yellow = Moderate impact and moderate probability
CY = Capacity	Green = Minor impact and minor probability
F = Financial	Blue = Insignificant impact and insignificant probability

Carbon Emissions & Climate Change Implications

No implications identified/

Equality and Diversity Implications

An Equality Analysis has been completed and has indicated a negative impact should the grant not be agreed. SRYP provide these specific services, as SSDC is unable to do so.

Financial Implications

Continue to fund the Service Level Agreement between SSDC and SRYP in 2017/18, Grant to remain at £8,000 per annum. This grant is already in the 2017/18 planned budget for Young People & Play.

Background Papers

Previous grants reports to District Executive.

5. Health And Wellbeing – Arts Organisations

Executive Portfolio Holder: Cllr Sylvia Seal, Leisure and Culture
Director: Rina Singh, Deputy Chief Executive
Assistant Director: Steve Joel, Health and Well-Being
Service Manager: Adam Burgan, Arts and Entertainment Manager
Report Author: Pauline Burr, Arts Development Officer
Contact Details: pauline.burr@southsomerset.gov.uk (01935 845944)

Purpose of the Report

This report seeks the approval of the District Executive on levels of funding for the following arts organisations: Actiontrack Performance Company, Take Art, Somerset Art Works and Somerset Film.

Public Interest

SSDC works in partnership with four arts organisations that provide a variety of activities across the district. This includes programmes of dance, performance, visual arts and new media with different sectors of the community, the village performance scheme which brings high quality shows to rural locations and support for local artists and craftsmen at a professional level. This report outlines the achievements of these organisations over the past year, as well as their plans for the forthcoming year.

Background

These four arts organisations are all based in Somerset and have a long track record of developing high quality arts projects that address social, economic, educational and health and wellbeing objectives. In addition to their projects they help to support the delivery of arts initiatives by the professional and voluntary sectors of the community, through advisory services and training.

Report

South Somerset District Council maintains a service level arrangement with four arts organisation; our funding acts as leverage in attracting grants and project funding from the Arts Council England and other funding bodies, resulting in delivery that has many times the value of our investment. They deliver services and activities which reflect the aims of the authority and are responsive to issues identified by local authorities and other agencies; programmes of physical activity through dance, encouraging people to explore and enjoy our landscape through visual arts and sculpture activities and understanding the use of digital technologies in a creative way are just some ways that these organisations engage with our communities and help us deliver our objectives.

The detailed performance monitoring figures and plans for 2016/17 for these 4 organisations are illustrated in the attached appendices.

The arts organisations supported by SSDC all have at least one year's running cost in reserve. They continue to review their working practice to adapt to reduced budgets and the changes in public service delivery.

Financial Implications

Core funding for each of the four organisations was reduced in 2011 as part of efficiency savings; we offered a slight increase in 2015/16 to each of the organisations, commensurate with the service they

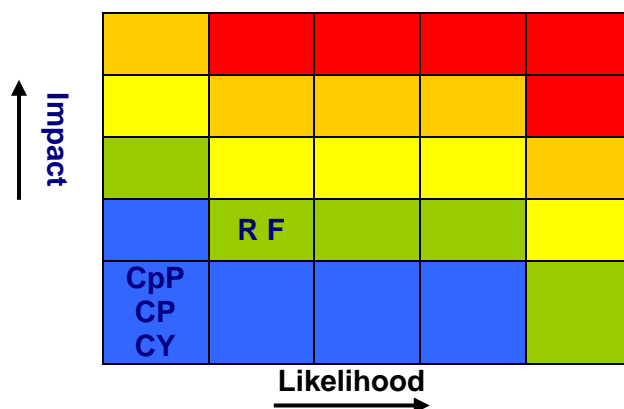
offer to our communities and the level of funding our investment attracts. Funding for 2017/18 will remain at the same level.

If the funding recommended as detailed below is agreed, £2,150 will remain in the Health and Well-being budget for 2017/18

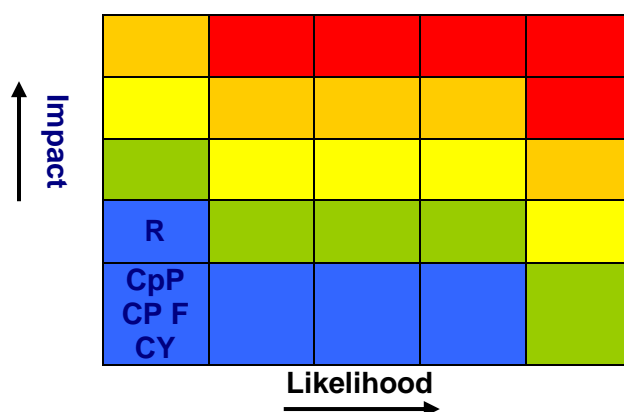
Actiontrack	£2,000
Take Art	£10,500
Somerset Art Works	£2,000
Somerset Film	£2,000

Risk Matrix

Risk Profile before officer recommendations



Risk Profile after officer recommendations



Key

Categories	Colours (for further detail please refer to Risk management strategy)
R = Reputation	Red = High impact and high probability
CpP = Corporate Plan Priorities	Orange = Major impact and major probability
CP = Community Priorities	Yellow = Moderate impact and moderate probability
CY = Capacity	Green = Minor impact and minor probability
F = Financial	Blue = Insignificant impact and insignificant probability

Council Plan Implications

The work of the arts organisations assists the Council deliver on the following values and priorities in the 2016-21 Council Plan:

Values:

- Supporting people and communities, enabling them to help themselves

Priorities

- Economy
 - Capitalise on our high quality culture, leisure and tourism opportunities to bring people to South Somerset
- Health and Communities
 - Help people to live well by enabling quality cultural, leisure, play, sport & healthy lifestyle facilities & activities

Carbon Emissions and Climate Change Implications

The majority of projects and programmes of activity is undertaken within our rural and urban settings, reducing the need for participants to travel long distances to access services.

Equality and Diversity Implications

This SLA is core funding for four arts organisations that deliver projects and programmes of activity which are inclusive or specifically targeted at marginalised groups.

All 4 organisations concerned are aware of their duties and responsibilities under the Equality Act 2010 and the General Equality Duty.

An equality analysis has been completed and indicated a low impact.

a) Actiontrack

Aims

Actiontrack works collaboratively to deliver opportunities for individuals and groups to access practical involvement in music, drama, dance and the visual arts. The organisation develops and delivers wholly accessible projects, predominantly with children and young people and often with marginalized groups.

The organisation operates from their office in Taunton Deane on an outreach basis to the county and beyond. Actiontrack is a charity that works on a full cost recovery basis from their projects and commissioned services. They are a delivery partner for Sound Foundation Somerset, the county's hub for music education. Actiontrack operates with a minimum number of permanent staff (1 f/t and 1p/t) and a number of freelance practitioners who are engaged as project funding become available. They encourage young and emerging practitioners to work with them, many of whom have advanced their careers as a result of this experience.

Organisational objectives for 2016/7

In addition to providing their core services, Actiontrack's work programme in South Somerset included:

- Continuation of their work with pupil referral units
- My Tunes
- Targeted youth support work
- Working with looked after children
- Chard Summer Showbuild
- Working with Somerset Sound Foundation, On the Record and World Music residencies
- Young people's performance master class at the Octagon

Performance & Targets 2016/17

	Organisation Objectives	Measure	2015/16	2016/17
	SLA related indicators/targets			
Participation	Increase attendances to cultural events	Number of attendances in South Somerset	389	417
	Increase participation in cultural activities	Number of participations in South Somerset	861	953
Stronger Communities	Develop range of activities across the District	Number of projects delivered in South Somerset	6	8
	As above	Number of community locations	4	5
Efficiency		Gross turnover	£150,000	£180,000
		SSDC funding	Core £1800 Project: £250	£2,000 £3,000

Outcomes for the Community 2016/17

- Arts residency at Hauser and Wirth Gallery working with local primary schools and gallery employees to create an artistic response to exhibition.
- Development of Youth Theatre Projects in Yeovil and Chard.
- Gamelan residency at Stanchester Academy, working alongside local primary groups.
- On The Record recording project workshops.
- Continued delivery of targeted music work at SSDC based Pupil Referral Units.

Development Plans 2017/18

In addition to their core services, the following projects are planned for the coming year:

- Delivery of World Music Residency around Castle Cary
- Development of Arts Centre participation and development project (subject to funding)
- Continued gamelan residencies across the district.
- Continued On The Record workshops
- Continued target music work
- Development of Youth Theatre Projects.

b) Take Art

Aims

Take Art is an arts development agency serving Somerset. It is a registered charity and a company limited by guarantee. Its purpose is to promote performance and participation in the arts in Somerset. Its arts development programme is delivered through its core services: -

- **Dance:** Take Art regularly works with dancers throughout Somerset to make workshops and dance classes happen. They support professional dancers and programmes for young and emerging dance artists.
- **Rural Touring:** This scheme forms a partnership with promoters in rural locations to bring high quality professional arts events into village halls and community venues.
- **Early Years:** Early Years works collaboratively with colleagues locally, regionally and internationally to provide opportunities for under-fives and their families to enjoy art experiences of the highest quality.
- **Theatre:** Take Art Theatre offers support, resources and opportunities to Somerset-based artists, practitioners and companies; young people and youth theatre companies; venues and programmers.
- **Music:** Take Art delivers a participatory programme of music activity with and for children and young people

Take Art receives funding from the Arts Council England as one of their National Portfolio Organisations.

Organisational objectives 2016/17:

In addition to their core services, Take Art has been working on the following in 2016/17:

- As part of their distinctive Take Art Rural Touring programme they will continue working with rural communities to promote high quality shows in villages and aim to deliver at least 22 performances a year in South Somerset
- Take Art will develop their relationship with groups in South Somerset exploring further theatre opportunities to promote health and well being
- They will continue to offer professional development opportunities to theatre practitioners and companies living and working in South Somerset
- My Tunes Music project with Pupil Referral Units will continue until March 2018 in South Somerset
- Through the InspirED project, schools across the district will be able to engage in Take Art's specialisms around dance, drama and creative work.
- Spring Forward will take place at the Octagon Theatre again in March 2017 and Somerset Youth Dance Company will continue to be Dance Company in Residence at the theatre.
- Take Art will be working with the Octagon to put together a 2nd phase application to the Arts Council to further support the development of dance at the theatre, in Yeovil and throughout South Somerset.
- Take Art will be applying to the Arts Council England to continue its National Portfolio status for the period 2018-2021. This would mean they would receive core funding for the next 3 years beyond the current NPO period
- Jump Start Boys Dance company will be developed and will run in Yeovil.

Performance and Targets 2016/17

2016/17 targets and performance are in the following table

	Organisation Objectives	Measure	2015/16	2016/17
	SLA related indicators/targets			
Participation	Increase attendances to cultural events	Number of attendances in South Somerset	InspirED – 516 Rural Touring –1800 Theatre - 15 Dance – 400 Early Years - 23 Total - 2754	InspirED – 312 Rural Touring – 1756 Dance – 320 Theatre – 0 Early Years - 0 Total – 2388
	Increase participation in cultural activities	Number of participations in South Somerset	Theatre – 50 Dance – 947 InspirED – 276 Early years - 92 Total - 1365	Theatre – 93 Dance – 530 InspirED – 501 Early Years - 20 Total - 1189

Equity	Increase opportunities for children and young people to take part in cultural activities	Number of attendances by children and young people	InspirED – 506 Rural Touring – 80 Theatre - 30 Dance – 20 Early Years - 20 Total – 656	InspirED –295 Rural Touring – 79 Dance – 75 Total - 449
	As above	Number of participations by children and young people	Dance – 947 Theatre - 30 InspirED – 266 Early Years - 80 Total – 1323	Dance – 500 InspirED – 475 Total - 975
	Increase opportunities for older people* to take part in cultural activities *(Defined as 50 +)	Number of attendances by older people	Rural Touring – 1100 Theatre - 12 Total - 1012	Rural Touring – 1186 Total - 1186
	As above	Number of participations by older people	Theatre - 10 Total - 10	Theatre – 11 Dance - 2 Total – 13
Stronger Communities	Develop range of activities across the District	Number of projects delivered	9	9
	As above	Number of community locations	InspirED – 8 Rural Touring – 15 Theatre - 3 Dance – 5 Word/Play – finished Dec 14 Early Years - 1 Total - 32	InspirED – 10 Rural Touring – 16 Theatre - 3 Dance – 2 Early Years - 2 Total - 33
Efficiency		Gross turnover	£460,000	£420,000
		SSDC funding	Core:£10,500 Project: £500	Core: £10,500

Outcomes for the community 2016/17

- **Rural Touring:** by end of March 2017 the Take Art Rural Touring programme will have brought 22 shows to 16 different village halls across South Somerset, including; Bruton, Chaffcombe, Charlton Horethorne, Chilthorne Domer, Charltons, Clapton & Wayford, Compton Dundon, Crewkerne, Curry Mallet, Kingsdon, Ilminster, Langport, North Cadbury, Rimpton, South Petherton and West Coker.

- **Word Play:** Take Art has formed a new partnership with Ryalls Park GP Surgery, Yeovil. During 2017, an 'arts on prescription' spoken word project around health and wellbeing took place at the surgery over 10 weeks. It culminated in a public performance at the Octagon Studio and as result the group were asked to perform at the Diversity Forum in South Petherton and also at SSDC's Aspirations & Challenges Day at The Gateway Centre, Yeovil.
- **Support to Performance Practitioners:** Take Art's Theatre Service continue to offer particular support to new emerging companies such as Wassail Theatre as well as established companies such as Boiling Kettle who now have a firm relationship with David Hall Arts Centre.
- **Tangle:** Tangle, SW African Caribbean Theatre Company continue to have their administrative base at the Take Art office. Take Art supported their Jan 2017 Towards the Sun Township tour to West Chinnock School and David Hall Arts Centre.
- **Diversity Forum:** Take Art launched this Forum in Jan 2017 in South Petherton. Attended by 41 people from the performing arts sector, including artists, venue programmers, graduates, SSDC representatives it featured 5 diverse performances from Tangle, Word/Play, Viv Gordon, OpenStoryTellers and Gloria Lawrence.
- We are continuing our research and development with Diverse City into an **integrated youth theatre**, however we are still working on evidencing the need.
- **The Early Years' service** has focused its energy on fundraising for the new programme. The efforts have borne fruit and they have had major success with grants from the Paul Hamlyn Foundation, Youth Music and the Real Ideas Organisation.
- The Early Years department at Yeovil College is an active partner in supporting workforce development, hosting a creative CPD session for their students, EY practitioners and artists on Tuesday 28 March 2017.
- **Spring Forward Youth Dance Platform** will take place at the Octagon Theatre on Wednesday 15th March with over 200 dancers taking part from across the Somerset (including South Somerset Groups - groups from Westfield School, Helen Laxton School of Dance, Dance Factory, Jump Start Boys group based at the Octagon, groups from Yeovil College).
- **Octagon Dance Development** – Take Art are continuing to work to support the Octagon Theatre in their Dance Development plans for the venue. This has been delayed slightly due to the developments internally at the Octagon with the acquisition of 'Westlands' but is still in the future plans. The idea would still be to focussed on developing audiences by taking dance into the local communities and has offered residencies and workshops in the past with Motionhouse, Richard Alston, Twist and Pulse and Jasmin Vardimon.
- **Somerset Youth Dance Company** continues its long standing connection with the Octagon Theatre and as an extension to this we have developed an all boys youth dance company '**Jump Start**' that runs from the venue. This has grown to have 10 boys aged between 8-14 years old and they will be performing at Spring Forward as well as other platforms.
- **Through InspirED**, early years audiences from Yeovil College Children's Centre, St Gildas Primary School and Norton sub Hamdon Primary School saw Malina's Dream, a high quality early years show.

Development Plans 2017/18

- As part of their distinctive Take Art Rural Touring programme they will continue working with rural communities to promote high quality shows in villages and aim to deliver at least 22 performances a year in South Somerset
- Take Art will continue their relationship with groups in South Somerset exploring further theatre opportunities to promote health and well being
- They will continue to offer professional development opportunities to theatre practitioners and companies living and working in South Somerset
- They will continue to develop their relationship with Tangle to offer further opportunities for diverse performances for South Somerset communities

- They will also continue to work with youth theatres in the district
 - Through the InspirED project, schools across the district will be able to engage in Take Art's specialisms around dance, drama and creative work
 - Take Art is working with Somerset County Council to identify weak spots in Early Years provision across the county and will be delivering professional development training to support the EY practitioner workforce. We are developing accreditation in EY music creativity at Level 3 and 4 and will be working closely with Yeovil College to achieve this and will be offering further CPD sessions there.
 - Apprenticeships for EY music practitioners will be made available.
 - Spring Forward Youth Dance Platform will take place at the Octagon Theatre again in March 2017
 - Jump Start/Somerset Youth Dance Company will continue to be Dance Company in Residence at the theatre.
 - Octagon Dance Development Project – Take Art will be working with the Octagon support the development of dance at the venue which may result in an Arts Council Grants for the Arts application.
 - Take Art will be applying to the Arts Council England to continue its National Portfolio status for the period 2018-2021. This would mean they would receive core funding for the next 3 years beyond the current NPO period
-

c) Somerset Arts Week

Aims

- To support local visual artists by developing opportunities for innovation and excellence
- Develop and extend the profile of SAW and the status of professional artists and makers in Somerset beyond the two week biennial event.
- Increase public awareness and involvement with visual artists and makers living and working in Somerset.
- To provide accessible information, support, advice, education and training in partnership with those concerned with the arts in Somerset, through joint projects and networking.

The annual Somerset Art Weeks event is funded largely through membership subscriptions, charging for participation and advertising. A small amount of core funding supports administration and overheads so that the team of four part-time staff can raise funds for specific projects and initiatives. The aim of the organisation is to develop opportunities for artists to work here in Somerset and for the community to experience high quality visual arts at a local level. Additional income is raised through grants from trusts and grant giving bodies such as the Arts Council England and other lottery schemes, European Funds, public and government agencies on whose behalf they deliver projects. They also have a Friends group, who fund raise with specific targets.

Organisational objectives 2016/17

In addition to their core services, plans for 2016/17 included:

- To deliver Somerset Open Studios: 17 September – 2 October 2016, with associated training and bursary opportunities for artists and makers.
- Touring pop-up studio to schools and local venues
- “Herbarium” a contemporary craft exhibition with the National Trust at Lytes Cary and associated business development for local makers

- “Water- Meadow Wood” Year 2 of a 3 year programme of arts activities at Yeovil Country Park,
- Education offer to InspirED subscribers in South Somerset
- Development of Cultural offer to schools /communities/ local museums ie Chard with Somerset Heritage Trust
- Plans for Festival Year 2017
- Cranes and Communities at Langport Festival and other events
- Place making and other consultations with Langport Town Trust

Performance & Targets 2016/17

	Organisation Objectives	Measure	2015/16	2016/17
	SLA related indicators/targets			
Participation	Increase attendances to cultural events	Number of attendances in South Somerset	Art Weeks Visitors 21,229 Projects 3,500	<i>Open Studios</i> 21,153 <i>Projects</i> <i>Herbarium July –Oct</i> 38,634 <i>Cranes</i> 359 <i>Meadow</i> c 2,500
	Increase participation in cultural activities	Number of participations in South Somerset	1,174	<i>Herbarium 21+ 12 =</i> 32 <i>Cranes</i> 54
Equity	Increase opportunities for children and young people to take part in cultural activities	Number of attendances by children and young people	1,053	1,838
	As above	Number of participations by children and young people	3,500	3,196
	Increase opportunities for older people* to take part in cultural activities *(Defined as 50 +)	Number of attendances by older people	10,114	16,922
	As above	Number of participations by older people	121	143

	Organisation Objectives	Measure	2015/16	2016/17
Stronger Communities	Develop range of activities across the District	Number of projects delivered	8	4 <i>Herbarium Meadow V3</i> <i>Cranes + com</i> <i>Travelling OS</i>
	As above	Number of community locations	7 plus 44 Art Weeks venues	4 + 69 <i>open studio venues</i>
Efficiency		Gross turnover	£140,000	£126,000
		SSDC funding	Core:£3,500 Project: £4,500	Core:£3,500 Projects £5,500

SAW 2016 – Somerset Open Studios Event:

The SAW Open Studios Event took place between 17th September to 2nd October, attracting visitors into the county and generating sales for small, independent businesses and additional custom for local services. Data collected for in-direct spend at local facilities indicates that visitors spent on average **£203**. Using an Economic Event Impact calculator this translates across the whole county to a total of **11,484,522** contributing to the economy of Somerset during this two week period.

Number of Venues Responding	82
Total Number of Venues	211
Recorded Number of Visits	21,987
Total Projected Number of Visits	56,576
Recorded Sales	N/a
Total Projected Sales	N/a
Average Sales per Venue	N/a
Average Number of Visits per Venue	238

Outcomes for the community in 2016/17

- Somerset Open Studios: 17 September – 2 October 2016, with associated training and bursary opportunities for Artists and Makers.
- Touring pop-up studio to schools and local venues in Somerton and Castle Cary.
- Herbarium a contemporary craft exhibition with the National Trust at Lytes Cary associated business development for local makers, schools and teachers' professional development training <http://somerstartworks.org.uk/what-we-do/projects/current-projects/herbarium/>
- Water- Meadow Wood Year 2 of a 3 year programme of arts activities at Yeovil Country Park; this year's theme of "Meadow" was explored by children from St Gilda's Primary School and adults from SS MIND group, working with artist, Carolyn Lefley <https://watermeadowwood.wordpress.com/>
- Education offer InspirED subscribers in South Somerset

- Development of Cultural offer to schools /communities/ local museums including Chard and Crewkerne with South West Heritage Trust
- Plans for Festival Year 2017
- Cranes and Communities at the Langport festival; workshops and exhibitions at other events including Bath and West <https://cranesandcommunities.wordpress.com/>
- Place making and other consultations with Langport Town Council

Development Plans 2017/18

In addition to their core services, the following projects are planned in the coming year:

- The theme for this year's main project is **Prospect**. It will offer - training and bursary opportunities for artists and makers. And culminate with work being shown at Art Weeks: 23 September – 8th October 2017
- In South Somerset:
 - **A Landscape of Objects**
 - Forde Abbey residencies, exhibition, school and families workshops
 - Art Weeks Contemporary Craft Showcase weekend 23-24 Sept with the National Trust at Lytes Cary
 - 'Plein Air' painting project exchange Somerset /Russian artists, schools and families workshops hosted by the National Trust in South Somerset
- Water- Meadow Wood Year 3 of a 3 year programme of arts activities at Yeovil Country Park, focussing on the woodland within the park
- Support for teachers and art in education projects are delivered in partnership with the LEA through the InspirED Education offer. Schools in Somerset are encouraged to subscribe to this initiative that offers high quality art experiences and raises attainment levels.
- Funding from the Heritage Lottery and Arts Council England is being sought for the "**Muse**," Makers in Museums, project. Working with the South West Heritage Trust, the project will develop the cultural offer to schools /communities/ local museums focussing on Chard and Crewkerne in South Somerset.
- Plans for Open Studios Year 2018
- Place making and other consultations with Langport Town Trust for the coming year.

d) Somerset Film

Aims

The Engine Room is Somerset's accessible community media centre and the base for the services of registered charity Somerset Film Ltd. From the Engine Room, Somerset Film supports digital media production and training for both the amateur and professional sectors. They offer a programme of

outreach projects that encourage the use of digital media to all sectors of the community and provide learning opportunities through schools based projects, bursary schemes and training for all abilities.

Core activities include:

- Drop-in access to equipment, on line resources and training
- Production and training opportunities and facilities
- Advice, support and information to a wide range of film and digital media makers, from absolute beginners to high level professionals
- Project and outreach work – specialising in working with community groups and individuals who want to get started with film

Organisational objectives for 2017/18

In addition to their core services, the following were proposed for the year 2016/17:

- Continuation of Ignite 2.0 – second year of a three year programme
- Pop-up Engine Room – delivery of a week of the kind of activities that are usually available at the Bridgwater base. These will be brought to a South Somerset location eg a community setting or empty shop.
- InspirED – the education service for schools, supported by the Somerset Compact for Children and Young People. Schools pay a subscription for this service, delivered in partnership with three other arts organisations.
- BFI Film Academy - a programme of masterclasses, screenings and film-making for 16- 19 year olds that offers bursary and travel support.

Performance & Targets 2016/17

	Organisation Objectives	Measure	2015/16	2016/17
	SLA related indicators/targets			
Participation	Increase attendances to cultural events	Number of attendances in South Somerset	6,000	20 <i>see note 1</i>
	Increase participation in cultural activities	Number of participations in South Somerset	646	67 <i>see note 2</i>
Stronger Communities	Develop range of activities across the District	Number of projects delivered	8	6
	As above	Number of community locations	9	6
Efficiency		Gross turnover	£300,000	£338,102
		SSDC funding	£1,500	Core: £2,000 Project:£650

Note 1 – Figures are lower than last year as 15/16 included appearance at Chard Carnival

Note 2 – Figures are lower than last year as 15/16 included participation in Careers workshops with four secondary schools in Yeovil

Neither of the above activities was repeated in this year.

Outcomes for the community 2016/17

SSDC's core funding ensures that Somerset Film provides support for local community groups and individuals, in the past year this has included:

- Continuation of Ignite 2.0 – second year of a three year programme. 7 x SSDC based artists received one to one surgeries through year.
- Pop-up Engine Room in Chard Lace Space 29 Jan till 2 Feb 2017 – delivery of a week of the kind of activities that are usually available at the Bridgwater base. Included Digital Photography, Creating Content for Youtube, Make a Film in a Day + artists' surgeries.
- InspirED – the education service for schools, supported by the Somerset Compact for Children and Young People. Schools pay a subscription for this service, delivered in partnership with three other arts organisations. New in 16/17 - Offer of new 'Imagined Worlds' teachers' pack, county wide InspirED Schools Celebration Event, Primary Time radio, film resource, Into Film literacy through film, Digidays project support.
- BFI Film Academy - a programme of master-classes, screenings and film-making for 16- 19 year olds that offers bursary and travel support. 7 x SSDC residents registered.
- Launch of Polish Voice TV on 28 Feb 2017 in association with Phoenix School of Languages (Yeovil) and Yeovil Advice Centre. Polish Voice TV encourages understanding between Somerset communities, demystifies national stereotypes, provides a space to share ideas and to promote collective endeavour – training course supported by SSL to follow x 15 adults.
- Setting up of Holman Hub film resource at South Cadbury in conjunction with Tea Room Arts. Video production and editing equipment available for pre-booked community use. Some initial training available, further training subject to funding.
- Partnership support for Great Places bid to Arts Council/Heritage Lottery led by SSDC and Take Art.
- We took lead on Action for Cultural Education network bringing a range of cultural, education and heritage partners (inc SW Heritage Trust, English Heritage, SPAEDA, Arts Council) to grow the cultural offer to schools.
- We took lead on Cultural and Creative Industries Strategy group with LEP, Chamber of Commerce, Arts Council, SCC and district councils to raise profile of and grow audiences for arts and culture in the county.
- 413 x SSDC residents are currently on our direct mail base

Development Plans 2017/18

In addition to their core services, the following projects are planned for the coming year.

- Continuation of Ignite 2.0 – third year of a three-year programme.
- Polish Voice TV training in Yeovil and the creation of an online platform.
- InspirED – the education service for schools, supported by the Somerset Compact for Children and Young People. Schools pay a subscription for this service, delivered in partnership with three other arts organisations.
- BFI Film Academy - a programme of master-classes, screenings and film-making for 16- 19 year olds that offers bursary and travel support.
- Development of Holman Hub film resource at South Cadbury in conjunction with Tea Room Arts. Video production and editing equipment will be available for pre-booked community use. Some initial training will be available; additional training and other projects will develop as funding allows.

Agenda Item 7

Council Tax Penalties and Civil Penalties in Housing Benefit

Executive Portfolio Holder: Peter Seib, Finance and Legal Services
Assistant Director: Donna Parham, Assistant Director (Finance and Corporate Services)
Service Manager: Ian Potter, Revenues and Benefits Manager
Lead Officers: Ian Potter, Revenues and Benefits Manager, Revenues and Benefits
Contact Details: ian.potter@southsomerset.gov.uk or 01935 462690

Purpose of the Report

1. To request that the District Executive recommends Council to endorse the application of Council Tax Penalties and Civil Penalties in Housing Benefit with effect from 1 April 2017

Forward Plan

2. This report appeared on the District Executive Forward Plan with an anticipated Committee date of 2 March 2017.

Public Interest

3. South Somerset District Council is responsible for the billing, collection and enforcement of Council Tax, the administration of Housing Benefit (on behalf of the Department for Work and Pensions) and the administration of Council Tax Support.
4. There is a wide range of Council Tax exemptions and discounts and the Council has a responsibility to the tax payer to ensure that where a discount, exemption, Housing Benefit or Council Tax Support award has been made that the recipient remains entitled to it.
5. The amount of Council Tax to be charged by each preceptor and the billing authority is determined by reference to the Council Tax base. This determines how much Council Tax each household is charged.
6. It is important therefore to ensure that only those entitled to a discount or exemption continue to receive it to prevent loss of income.

Recommendation

7. The District Executive is requested to:
 - (a) recommend to Council that it endorses the application of Council Tax and Housing Benefit Civil Penalties with effect from 1 April 2017

Background

Council Tax

8. Currently Council Tax discounts, exemptions and Council Tax Support amounting to £19.7m have been applied to Council Tax accounts for the financial year 2016/17.
9. The recipient of a Council Tax discount, exemption or Council Tax Support award has a legal duty to notify the Council within 21 days if there has been a change in circumstances which affects

Council Tax liability or would mean that the discount or exemption no longer applies, or would mean that the amount of their award might be affected, including reducing it to nil.

10. Any reduction that a Council Tax payer continues to receive but is not entitled to is “lost income” to South Somerset District Council, Somerset County Council, Avon and Somerset Police, Devon and Somerset Fire and Rescue Authorities and Parish Councils.
11. Some time ago, the Audit Commission estimated that between 3% and 11% of discounts, reductions and exemptions claimed against Council Tax were either incorrect or fraudulently claimed (Audit Commission 2009).
12. If it is assumed that the current rate of error is 5%, that would represent approximately £985k of lost income across all preceptors in Somerset. The SSDC loss of income on that basis would be approximately £98k.

Housing Benefit

13. The Council administers Housing Benefit on behalf of the Department of Work and Pensions and it is estimated that approximately £44m will have been paid out in Housing Benefit in the 2016/17 financial year. The Council receives funding from Government for the Housing Benefit it pays out.
14. However where a late or unreported change results in an overpayment of Housing Benefit the council only receives a reduced funding of 40 pence in the pound. At least 60% of any overpayment needs to be recovered in order that the Council does not suffer a financial loss. As with all debt there is a risk of non-collection and therefore financial loss for the Council.
15. The most effective way to minimise potential loss both in Council Tax and Housing Benefit funding is to encourage the timely reporting of changes in circumstance that affects entitlement to discounts, exemptions and Housing Benefit. Penalising those who fail to carry out their legal duty to notify the Council of such changes is designed to bring about future behavioural change.

Current compliance regime

16. The Council has a multifaceted compliance regime across Council Tax and Housing Benefit that identifies unreported changes. This includes:
 - An increased collection team
 - Real Time Information from HMRC
 - Housing Benefit Matching Service referrals
 - National Fraud Initiative data matching
 - Council Tax discount and exemption review programme
 - Council Tax Support and Housing Benefit claim review programme
17. This compliance work contributes to minimising the loss of income. However with the exception of the Real Time Information from HMRC the rest of the changes identified have normally occurred sometime in the past. Collecting the additional Council Tax due where a discount or exemption is removed for a past period is not always straightforward and there is an element of risk of some non-collection. Similarly collecting overpaid Housing Benefit carries a risk of non-collection.

Demand reduction

18. The late or non-reporting of changes in circumstances creates avoidable demand in a number of ways. It increases the volume of reviews that needs to be carried out both on Housing Benefit and Council Tax Support claims and on Council Tax records. A proportion of people will repay the

additional Council Tax or Housing Benefit overpayment without requiring intervention. However, those that do not, create avoidable contact. This may involve the sending of reminder notices, the issuing of a summons, monitoring payment agreements, dealing with broken agreements and further enforcement action. There will also be telephone demand associated with this additional work. This all adds to the cost of administering Council Tax and Housing Benefit.

19. Taking steps to encourage people to tell us about changes in circumstance in a timely way will help to reduce avoidable demand as well as reducing costs and minimising loss of income.

Reporting changes in circumstance

20. We take every opportunity to inform people of their duty to tell us about changes in their circumstances. We also make it easy for people to tell us about changes.
21. In addition to reporting changes by phone and in writing, there are a number of on-line forms covering Council Tax and Housing Benefit/Council Tax Support.
22. The Benefits Team has recently launched a photo upload facility which enables people to provide evidence of their change electronically which removes delays in receiving the evidence and reduces demand in the post room and customer service counters.
23. Making it easy to report changes and provide evidence provides further encouragement for timely notification.

Penalties

Council Tax Penalties

24. The Council is legally entitled to obtain information from residents, owners or managing agents to help identify the person liable for payment of the Council Tax.
25. Where a person fails to supply certain information we have requested within 21 days of the request for the information, or knowingly supplies inaccurate information in purported compliance with such a request, we may impose a penalty.
26. As mentioned, the recipient of a Council Tax discount, exemption or Council Tax Support award has a legal duty to notify the Council within 21 days if there has been a change in circumstances which affects Council Tax liability or would mean that the discount or exemption no longer applies, or would mean that the amount of their award might be affected, including reducing it to nil.
27. The law allows Councils to impose a £70 penalty to any person who:
 - a) fails to notify the Council that an exemption on a dwelling should have ended
 - b) fails to notify the Council that a discount should have ended
 - c) fails to notify the Council of a change of address or fails to notify the Council of a change in the liable party
 - d) fails to provide information requested to identify liability
 - e) fails to provide information requested after a liability order has been obtained
 - f) fails to notify the Council that Council Tax Support should have ended

- g) fails, without reasonable excuse, to notify the Council that there has been a change in their circumstances which would affect Council Tax Support
28. Where a penalty has been imposed and a further request for the same information is made to that person and is again not properly complied with, the Council may impose a further penalty of £280. A penalty of £280 may be imposed each time the Council repeats the request and the person does not fulfil their statutory obligations.
29. Where the Council possesses a liability order for failure to pay Council Tax, The Council has the right to ask the customer for details of their employment and other income. It is a criminal offence not to supply the information without reasonable excuse, or for a person to knowingly or recklessly supply false information. The matter can be referred back to the Magistrates' Court for a summary conviction and fine to be imposed. These fines would be collected by the Magistrates and paid to the Council.

Civil Penalties for Housing Benefit

30. A recipient of Housing Benefit has a legal duty to notify the Council within one month if there has been a relevant change in circumstances which would mean that the amount of their award might be affected, including reducing it to nil.
31. A "relevant change of circumstances", means a change of circumstances that a person might reasonably be expected to know might affect their entitlement to, or the amount of, Council Tax Support.

Applying a penalty

32. The Council will align the time allowed to report a change affecting Council Tax before a penalty is applied with that allowed for reporting changes to Housing Benefit i.e. one month.
33. Details regarding the application of penalties, where they will not be applied and how to appeal against a penalty are contained in the attached appendix.

Relevant Legislation

34. The following legislation permits the application of Council Tax penalties and Civil Penalties.
- Schedule 3 of the Local Government Finance Act 1992
 - Local Government Finance (England)(Substitution of Penalties) Order 2008 (S.I 2008/981)
 - Regulation 12 & 13 of the Council Tax Reduction schemes (Detection of Fraud and Enforcement)(England) 2013
 - The Council Tax (Administration and Enforcement) Regulations 1992 (S.I 1992/613)
 - The Valuation Tribunal for England (Council tax and Rating Appeals)(Procedure) Regulations 2009 SI 2009/2269
 - The Social Security (Civil Penalty) Regulations 2012 (SI 2012/190)
 - Welfare Reform Act 2012

Management Information & Reporting

35. For at least the first 12 months the Council will produce management information covering all penalties imposed. This will enable the Council to determine the effectiveness of the policy, identify areas for improvement in decision making and processes.

36. Management Information to be recorded will be:

- Volume of penalties & reasons for the imposition
- The volume and value of penalties recovered
- The volume and value of penalties written off
- The type and effectiveness of action taken to recover each penalty
- The volume of complaints made and upheld
- The volume of appeals made against a penalty and reasons for appeal
- The volume of cases going to Valuation Tribunal and the volume of successful appeals
- The volume and reason for exemption from a penalty where one would otherwise have been imposed

Publicising Council Tax Penalties and Civil Penalties in Housing Benefit

37. The Council already includes a warning about the right to impose penalties on Council Tax bills and other documentation.
38. We have included a flyer reminding people of their duty to notify the Council about relevant changes affecting entitlement to discounts, exemptions, Council Tax Support and Housing Benefit with all annual Council Tax bills and Housing Benefit award letters. A copy of this is shown in appendix A.
39. The intention is to publicise the introduction of the application of Council Tax and Civil Penalties through a wide range of channels including a press release, social media and our website.
40. While the use of penalties is planned to come in to effect from 1 April 2017 it would be appropriate to allow some time between the publicity taking place and the commencement of penalty imposition. It is proposed therefore that any changes relating to a past period reported up to and including 30 April 2017 will not attract a penalty.

Policy review

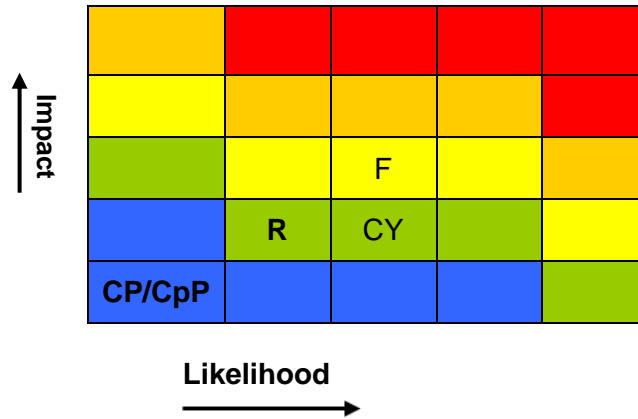
41. This policy will be reviewed periodically and at least every three years to ensure it is, and remains fit for purpose. This policy will also be updated at the time relevant legislation changes.

Financial Implications

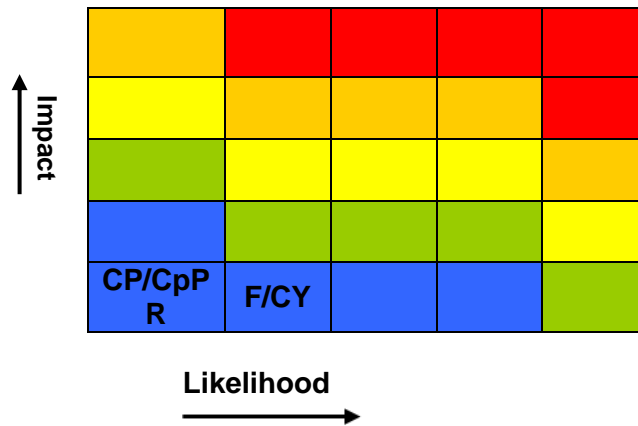
42. There are no adverse financial implications associated with this report. It is not possible to estimate the value of penalties that might be applied and collected during 2017/18. All penalty income collected does not form part of the collection fund and remains with SSDC. The management information collected during the year will enable a decision to be made as to how much should be added to the Medium Term Financial Plan for future years.

Risk Matrix

Risk Profile before officer recommendations



Risk Profile after officer recommendations



Key

Categories	Colours (for further detail please refer to Risk management strategy)
R = Reputation	Red = High impact and high probability
CpP = Corporate Plan Priorities	Orange = Major impact and major probability
CP = Community Priorities	Yellow = Moderate impact and moderate probability
CY = Capacity	Green = Minor impact and minor probability
F = Financial	Blue = Insignificant impact and insignificant probability

Council Plan Implications

None associated with this report

Carbon Emissions and Climate Change Implications

None associated with this report

Privacy Impact Assessment - None associated with this report

Background Papers - None

Appendix A

How penalties will work

Penalties are payable directly to the authority that imposed them (the billing authority), and can be collected by adding the penalty to the person's Council Tax liability and detailing it on their Council Tax bill.

A penalty request memo will be completed by a member of the Revenues and Benefits Team and must be approved by a Revenues or Benefits Team Leader or the Revenues and Benefits Manager before being applied.

Once the penalty has been applied to the account a letter will be sent to the person(s) in all cases advising of the application of the penalty and the reason for it. The letter will also set out the right of appeal.

A revised Council Tax bill will also be issued showing the penalty which has been applied on a separate line.

Where a penalty is imposed where the person who has not supplied the information does not have a Council Tax account an invoice will be raised for repayment.

In the case of Housing Benefit the Civil Penalty will be recovered by raising an invoice.

Exceptions

The Council will exclude taxpayers and Housing Benefit recipients from the imposition of a penalty where they have relevant mitigating family/personal circumstances, for example recent bereavement or serious illness. Council Tax payers or benefit recipients who are severely mentally impaired are also excluded from the penalty scheme.

Exclusion from a penalty will also be considered in cases where the customer or their partner has a significant degree of physical or mental infirmity, such as a terminal illness, severe clinical depression, and hearing/sight/speech problems, learning difficulties or frailty due to old age.

All identified exceptional cases will be passed to a Revenues or Benefits Team Leader or the Revenues and Benefits Manager for a decision to be made.

Appeals

Where the Council's decision to impose a penalty is disputed an appeal can be made to a Valuation Tribunal. Before making an appeal the appellant will first ask the Council to review its decision.

Where a penalty is imposed on a person and he alleges that there is no power in the case concerned to impose a penalty of the amount imposed, he may appeal against the imposition.

Where the imposition of a penalty is subject to an appeal, no amount shall be payable in respect of the penalty while the appeal is outstanding.

The Council has the power to quash a penalty that it has imposed.

Agenda Item 8

Proposed Changes to Business Rates Relief Policy

Executive Portfolio Holder: Peter Seib, Finance and Legal Services
Assistant Director: Donna Parham, Finance and Corporate Services
Service Manager: Ian Potter, Revenues and Benefits Manager
Lead Officers: Ian Potter, Revenues and Benefits Manager, Revenues and Benefits
Sharon Jones, Revenues Team Leader, Revenues and Benefits
Contact Details: ian.potter@southsomerset.gov.uk or 01935 462690
Sharon.jones@southsomerset.gov.uk or 01935 462256

Purpose of the Report

1. To request that the District Executive approve the proposed amendments to the Council's Business Rates Discretionary Rate Relief Policy (DRR Policy).

Forward Plan

2. This report did not appear on the District Executive Forward Plan but requires a decision prior to the 2017/18 Financial Year.

Public Interest

3. A range of Mandatory and Discretionary Rate Reliefs exist to reduce (in some cases to Nil) the amount of Non-Domestic Rates (commonly known as business rates) a business or organisation has to pay. The qualifying rules and levels of relief for Mandatory Reliefs are set by Government and are the same throughout the country. The rules and levels of award for Discretionary Rate reliefs are set by each Council and as such may vary from Council to Council. A full review and updating of the policy was undertaken in 2014 with the policy coming in to effect from 1 April 2015. It was subsequently updated with effect from 1 April 2016.

Recommendations

4. The District Executive is requested to:
 - a) approves the use of the Council's local discount powers to grant 100% Rural Rate Relief to eligible ratepayers from 1 April 2017;
 - b) approves the use of the Council's local discount powers to introduce a local discount of £1500 a year for Local Newspapers which would come in to effect on 1 April 2017;
 - c) Note that the Retail Relief which was in place for 2014/15 and 2015/16 has been removed from the policy as the deadline for applications has now passed;
 - d) Note that the Flood Relief which related to premises flooded between 1/12/13 and 31/03/14 has been removed from the policy as the deadline for applications has now passed;
 - e) Note that the temporary Transitional Relief scheme has been removed from the policy as it comes to an end on 31 March 2017. A new national Transitional Relief Scheme is being introduced alongside the new 2017 Rating List.
 - f) Recommend to Council a change to the DRR Policy on Discretionary 'Top up' Charity Relief to 100% where the rate payer would, apart from entitlement to Mandatory Charity, otherwise qualify for 100% Small Business Rate Relief

- g) Note the DRR Policy Overview and Scrutiny Committee Task and Finish Group have considered and support the proposed amendments

Background

5. The Local Government Finance Bill 2012 introduced the Business Rates Retention Scheme. The scheme is designed to help achieve two of Government's key priorities: economic growth and localism. The scheme enables the retention of a proportion of the business rates revenue generated in a local area by the relevant local authorities. Business rates retention is intended to provide incentives for local authorities to drive economic growth, as the authorities will be able to retain a share of the growth that is generated in business rates revenue in their areas, as opposed to the previous system where all business rates revenues were held centrally. The government has announced that the share to be paid to central government from business rates collected will be 50%. Therefore 50% of business rates will be retained locally (40% District, 9% County, 1% Fire authorities).
6. As part of the Retention Scheme Government changed the contribution it makes to the various rate reliefs. Reliefs were previously broken down into mandatory support (support set by central Government) that was repaid to the local authority in full from the Government on the basis that local authorities had no choice but to award it under set criteria. The remaining discretionary relief (support set through SSDC) that the authority had to pay either in full or a proportion of but allocation was based on the authority's own criteria.
7. Under the new Government rules SSDC has to contribute 40% towards all reliefs even those that it has no choice about awarding. It has therefore been important to recognise the financial risk of applying reliefs when considering the new policy. The financing of reliefs need to be both affordable and balance the needs of the business and those of the local tax payer.
8. This current policy was created after extensive work by the Council's Overview and Scrutiny Committee Task & Finish group and in consultation with both internal and external (business stakeholders). It came in to effect on 1 April 2015 with a transitional period of one year for current recipients, and was updated for the 2016/17 financial year.

Proposed Policy changes for 2017/18

Autumn Statement 2016 – Mandatory Rural Rate Relief announcement

9. In his Autumn Statement the Chancellor confirmed that the Government will double Mandatory Rural Rate relief to 100% from 1 April 2017. However this requires a change to primary legislation. The Government intends to amend the relevant primary legislation to require local authorities to grant 100% mandatory rural rate relief but cannot achieve this in time for the 2017/18 financial year.
10. Therefore, before the requirement to grant mandatory relief comes into force in April 2018, Government expects local authorities to use their local discount powers to grant 100% Rural Rate Relief to eligible ratepayers from 1 April 2017. Local authorities will be compensated in full for their loss of income as a result of this change. This compensation will be paid through a section 31 grant and calculated on the basis of the Government returns that councils submit under the rates retention scheme. Note that this is subject to State Aid limits.

Budget Statement 2016 - Local Newspapers

11. The Chancellor announced at the Budget that the Government will introduce a £1,500 business rates discount for office space occupied by local newspapers, up to a maximum of one discount per local newspaper title and per hereditament, and up to state aid limits, for 2 years from 1 April 2017. The relief will be delivered through local authority discretionary discount powers under section 47(3) of the Local Government Finance Act. Government will reimburse billing authorities for the actual cost to them under the rates retention scheme of granting this relief.
12. There is currently one local newspaper office that would qualify for this discount.

Budget Statement 2016 – Small Business Rate Relief announcement

13. At Budget 2016, the Government confirmed that the temporary doubling of the Small Business Rate Relief (SBRR) from 50% to 100% would be made permanent from 1 April 2017. The £6,000 and £12,000 thresholds would be increased as follows, up to £12,000 and up to £15,000 respectively. This means that premises with rateable values below £12,000 or that meet the eligibility criteria for SBRR will receive 100% relief and those businesses with rateable values from £12,000 up to £15,000 will receive a tapered relief.

Effect of Small Business Rate Relief announcement on SSDC DRR Policy

14. At that time there was no mention of changes to either Mandatory Rural or Charity Relief. Small Business Rates Relief cannot be awarded where the ratepayer is entitled to Mandatory Rural or Mandatory Charity Relief. Mandatory Rural Rate Relief is awarded at the rate of 50% of the rates payable, while Mandatory Charity Relief is 80% of the rates payable.
15. The Council's Discretionary Rate Relief Policy allows a top up to these reliefs to varying degrees depending on meeting the relevant criteria in the policy. Generally the total of Mandatory and Discretionary Rate Relief does not exceed 90%. The announcement on SBRR in the budget meant that there would be cases where a rate payer in receipt of Mandatory Rural Rate Relief and Discretionary 'top-up' Rate Relief, or Mandatory Charity Relief and Discretionary 'top-up' Rate Relief would receive less support than rate payers not entitled to Rural or Charity Relief in premises with the same rateable value.

Review of the DRR Policy

16. An Overview and Scrutiny Task and Finish Group was convened to undertake an annual review of the DRR Policy. The Group considered the above effect along with other elements of the Policy.
17. Prior to the Autumn Statement, the Task and Finish Group members had decided to recommend that the Council's DRR Policy be amended to allow for a 'Better Buy' decision to be made in cases where a rate payer was entitled to Mandatory Rural Rate Relief, or Mandatory Charity Relief. This would have the effect of resolving the anomaly created by the permanent doubling and increase in the rateable value thresholds of Small Business Rate Relief.
18. The subsequent announcement to grant 100% Rural Relief from 1 April 2017 has removed the anomaly for those rate payers.
19. However the level of Mandatory Charity Relief was not changed, and so for these rate payers the anomaly still exists.

20. A possible measure to resolve this anomaly would be to award additional Discretionary 'top-up' Rate Relief where the rate payer would, apart from entitlement to Mandatory Charity Relief have otherwise qualified for 100% Small Business Rate relief based on the rateable value of their premises.
21. The Table below shows the types of premises receiving Mandatory Charity Relief that would benefit from this measure.

Description	Number	Description	Number
Café	1	Restaurant	1
Car Park	1	School & Premises	2
Club/Clubhouse	8	Shop	9
Day Nursery	5	Sports ground	3
Hall	9	Store	4
Museum	2	Swimming Pool	1
Offices	11	Theatre	2
Other	4	Workshop	2

22. In addition, two Community Amateur Sports Clubs would also benefit from this measure.
23. A report on the work of the Task and Finish group, it's findings and recommendations of the Task and Finish Group are attached at Appendix A.

Future monitoring and review

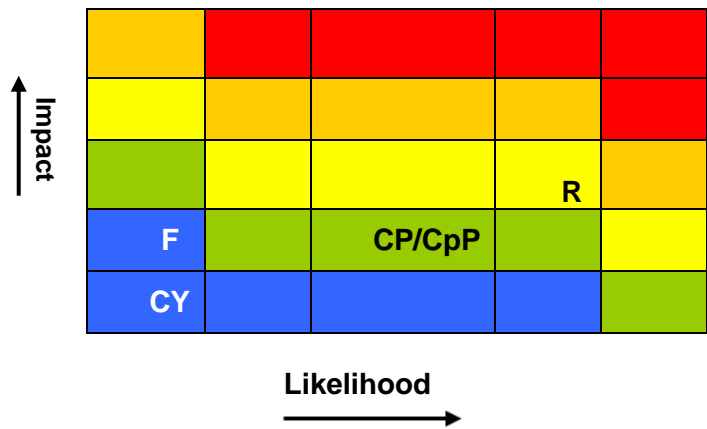
24. The content of the policy will continue to be reviewed annually and brought back before members where further updates are required.

Financial Implications

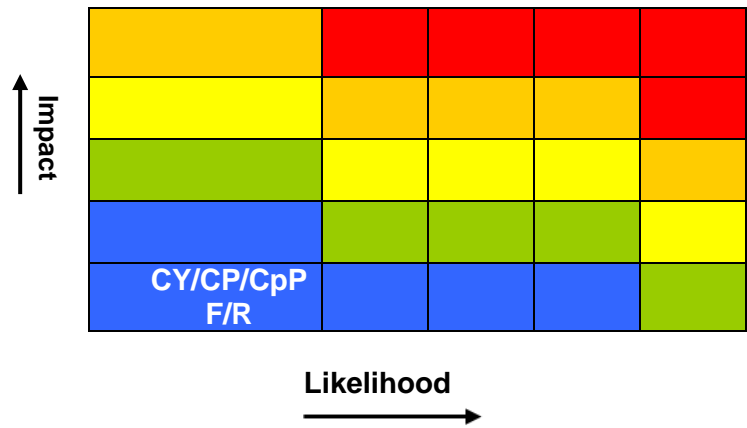
25. The use of the Council's local discount powers to grant 100% Rural Rate Relief, and the Local Newspaper discount will be reimbursed in full by Government.
26. The use of the Council's local discount powers to grant 100% Rural Rate Relief to eligible ratepayers from 1 April 2017 will reduce the cost of Discretionary 'top-up' Rural Rate Relief by £20,800. This SSDC share of this saving would be £8320 (i.e. 40%).
27. The introduction of the 'Better Buy' award for charities receiving Mandatory Charity Relief will increase the cost of Discretionary 'top-up' Rate Relief by a maximum of £30,318 (assuming they all meet the Small Business rate relief entitlement criteria). The SSDC share of this additional cost is £12127 (i.e. 40%).
28. Taking account of the saving on Discretionary Rural Rate Relief the maximum net cost of these two measures would be £9,518. The SSDC share of this cost is £3807 (i.e. 40%).
29. This will absorbed by current budgets.

Risk Matrix

Risk Profile before officer recommendations



Risk Profile after officer recommendations



Key

Categories	Colours (for further detail please refer to Risk management strategy)
R = Reputation CpP = Corporate Plan Priorities CP = Community Priorities CY = Capacity F = Financial	Red = High impact and high probability Orange = Major impact and major probability Yellow = Moderate impact and moderate probability Green = Minor impact and minor probability Blue = Insignificant impact and insignificant probability

Council Plan Implications

30. Economy - Supports the “Economy” Priority - To promote a strong economy with thriving urban and rural businesses.

Carbon Emissions and Climate Change Implications

31. None associated with this report

Equality and Diversity Implications

32. An equalities impact was carried out as part of the original policy review and there are no implications associated with the proposed policy revisions.

Privacy Impact Assessment

33. None associated with this report

Background Papers

- SSDC Discretionary Rate relief Policy accessed at www.southsomerset.gov.uk/business-rates/ndr-relief-policy
 - Business Rates Information Letter (BRIL) 3 2016 – Autumn Statement Measures and 2017 Revaluation accessed at www.gov.uk/government/collections/business-rates-information-letters
 - Report to District Executive - March 2016 item 10
 - Report to Council – March 2015 item 5
 - Report to District Executive – November 2014 item 8
-



Monitoring SSSDC National Non Domestic Rates Discretionary relief policy

Report and Findings of the Overview and Scrutiny Task and
Finish Group

February 2017

Chair's forward

An Overview and Scrutiny Task and Finish group commenced in July 2016 to review the effectiveness of the South Somerset National Non Domestic Rate (NNDR) commonly referred to as Business Rates Discretionary Relief policy that was revised in 2013/14 and came into effect on 1st April 2015. This policy was created with extensive input from an Overview and Scrutiny Task and Finish group and it was a recommendation from this group that monitoring is undertaken to measure the impact and success of the policy.

The key aims of the original group were to ensure the revised policy:

- Met with the needs of the Council Plan and related strategies to support the Council's objectives for South Somerset and to support the essential and widely varied voluntary and non-profit making organisations that make South Somerset a great place to live and work in.
- Provided transparency and accountability in the decisions made, recognising that a proportion of the assistance given through Discretionary Rate Relief is paid by the local taxpayer and as such the Council has a duty to ensure public funds are spent wisely.
- Is accessible and not too complex for both the applicant and officers to administer;
- Effectively utilise relevant expertise and skill across SSDC.
- Has adequate measures to provide stability to the recipients of NNDR relief.
- Has adequate flexibility and could evolve i.e. to meet new requirements, to ensure that it keeps up with any changes Council objectives, and to allocate annual awards.
- Take into account the financial risks of applying the new policy.

The following report provides an overview of the monitoring work of the Task and Finish group, its findings and recommendations.

I would like to take this opportunity to thank the members who conducted this review and the officers who supported us throughout the process.

Sue Steele

Scrutiny Committee Chair

Task and Finish group Members:

Sue Steele Review Chair

Mike Beech
Michael Lewis
David Norris
Sue Osborne
Alan Smith

Officer Support

James Gilgrist	Economic Development Officer
Sharon Jones	Revenues Team Leader
Helen Morris	Revenues Team Leader
Ian Potter	Revenues and Benefits Manager
Ashley Smalley	Revenues Monitoring Officer
Jo Gale	Scrutiny Manger

The Work of the Task and Finish Group

The Task and Finish Group explored the following areas with Revenues Officers to assess the effectiveness of the policy:

- Have the ambitions of the original Task and Finish group been met?
- Is the policy helping to achieve the principles that the Task and Finish group set as a basis for the policy? (The principles that formed the basis of the policy are detailed in appendix 1).
- Relevant data to ascertain if the policy and associated processes are effective for applicants and recipients and are appropriate in terms of resource and cost.
- Identify any external changes or pressures that may impact on the deliverability and intentions/outcomes of the policy.

Is the policy fit for purpose/achieving the ambitions and principles of the original Task and Finish Group?

In response to member questions Revenues Officers reported:

- The administration of the scheme has been manageable; no additional resource has been required and is likely to be less time consuming going forward.
- Now the policy is so clearly defined, there is greater acceptance when people do not qualify for the discretionary relief and therefore less challenges progressing to management level.
- A very small number of appeals have come forward and in most cases this has been due to people misinterpreting the scheme, assuming they could qualify for more relief as it is titled discretionary relief.
- Reviewing the scheme now annually will be much less time consuming for staff.
- Although not a priority of the scheme design, the relief awarded has decreased, this is reassuring in terms of minimising financial risk to SSDC.

Have there been any unforeseen issues or consequences for SSDC, business organisations, charities etc. as a result of the revised policy?

Revenues officers explained the wording around the criteria for museums was tightened up to reflect members' intentions of this being specifically for small museums during 2015 (now only awarded where the Rateable Value is below £50,000). This year they had received representations on behalf of rural Post Offices.

Members reviewed the impact on Rural Post Offices and questioned if it was fair that they should pay a 10% NNDR charge when compared to other business and organisations it could be argued that they are restricted as to how they can make a business more profitable

compared with those in urban areas who may qualify for 100% Small Business Rate relief from April 2017 following a change in the rules.

The Task and Finish group discussed the original intention of the policy and how it was agreed originally that the scheme should reflect in many ways the principles of the Council Tax Reduction scheme, an example – Everyone should contribute something. Members agreed the value of the rates left to be paid once the Mandatory and Discretionary reliefs totalling 90% had been applied was easily affordable in most cases and that the information that had been presented by the rural Post Offices highlighted that they're being impacted upon by many different issues, in particular the post office re-organisation. Members also commented on how many services people used to use post offices for are now available on-line.

Members concluded no changes should be made to the policy at this time. This decision has been superseded by the changes brought about by the Autumn Statement – detailed later in this report.

How accessible/easy are the processes applicants need to go through to apply for the relief and the methods of administrating the policy for staff?

The Revenues Officers informed the group:

- New application forms were designed and implemented to ensure all the information necessary to determine the level of discretionary relief was provided at the earliest opportunity.
- No issues/complaints have been raised with regard to the process and planned enhancement.
- Where we need to assess if there is a true financial need for the support, the Finance team review the accounts/books. (costs for this needs to be monitored moving forward).
- That the next phase of work is to get the application forms accessible on-line

What does the NNDR collection rate information and arrears data show throughout the period when the changes to the policy have been introduced?

The Revenues Officers reported:

- There isn't any evidence of ratepayers falling into arrears due to the revision of the policy. (Some summons were issued but this was as result of people not contacting SSDC and submitting their applications and evidence to qualify for awards too late).
- The collection rate has improved since 2014/15

Year	Collection Rate
2014/15	95.44%
2015/16	97.03%
2016/17 estimated projection	98.00%

Future or external changes or pressures that may impact on the deliverability and intentions/outcomes of the policy

Revenue Officers sought clarification where the award of 20% discretionary relief for Sole Rural pubs has been awarded because they can demonstrate they are making significant efforts to help the business succeed, if this should be given for a maximum length of time or if it is based purely on the continued efforts. Members confirmed the maximum award period should be three years and there should be new evidence provided each year to demonstrate what efforts and new approaches/ideas are being trialled.

Proposed change to raise the threshold for Small Business Rate relief (SBR) from £6000 to a maximum of £15,000 - Small Business Rate relief was proposed to be changing with effect from 1st April 2017; currently businesses occupying premises with a Rateable Value (RV) up to £6,000 can qualify for 100% relief where they meet the qualifying criteria. This upper RV limit is being increased to £12,000 and those businesses with an RV of between £12,001 and £15,000 will get a tapered relief, again where they meet the qualifying criteria.

Members with Revenues Officers reviewed the impact this will have /how it could be seen to cause unfairness across the district by recipients of Mandatory Rural relief (this applies to the Sole post office, Petrol Station and General store in what has been identified as a Rural settlement RV up to £8,500) and charitable relief. (Village Halls, Community Centres and meeting rooms, Scout Guide and Youth Organisations, Pre – Schools/Play groups and nurseries with a charitable status, Charity office where charity service is actually being provided, Sports Clubs, CASC's, Museum, Heritage, Arts centre and Theatres)

The officer's spoke of their concern that much has been publicised to suggest Small Business will not have to pay rates and this without the lack of detail will cause confusion for Rural Business and charities etc.

Members agreed they needed to consider if the SSDC discretionary relief scheme should be revised to take into account the proposed changes to SBR and requested the revenues team identify those cases where receiving Mandatory Rural relief as opposed to SBR could leave them worse off than a similar business not in a rural settlement or an organisation who is not a charity.

Revenues officers provided an overview of the impact of the changes to the Small Business Rate Relief. During the overview and through subsequent discussion the following points were made:

- Due to the hierarchy of the Rating relief system, those businesses and organisations that qualify for a mandatory Charitable or Rural rate relief will not benefit from this change, this includes cafés, halls, and rural shops, pubs, post offices and petrol filling stations.
- If the SSDC Discretionary rate relief policy is left as it is now with effect from 1 April 2017 a small pub, café, post office shop or filling station etc. with an RV up to £12000 that is in a rural settlement will have to pay some business rates of between 10% and 50% of their annual charge. Those same types of business in an urban area (not classed as a rural settlement) will not pay any business rates where they meet the qualifying criteria for Small Business Rate relief.

- If the SSDC Discretionary rate relief policy is left as it is now with effect from 1 April 2017 a café or a hall etc. that is run by a charity with an RV up to £12,000 would have to pay between 10% and 20% business rates. Those cafés and halls etc. that are not being run as a charity will not pay any business rates where they meet the qualifying criteria for Small Business Rate relief.
- This is only applicable to small charities who only have 1 property or if they have more than one, whose total RV of all properties is still below £12,000.
- Based on the Draft RV list which is as at 30th September 2016 118 properties would be unable to qualify for the 100% SBR despite having an RV below £12000 due to receiving a mandatory charity or rural rate relief.
- If members wanted to amend the SSDC policy to prevent those businesses, organisations or charities in receipt of a mandatory or charity relief being disadvantaged an additional £74,000 of discretionary relief would need to be awarded.
- Of the additional relief that would need to be provided 40% of the cost would fall to SSDC, 10% to Somerset County Council and 50% to central Government.
- The additional cost is the equivalent to approximately 50 pence per household paying Council Tax, unless the money could be found from a grant.
- Under rate retention the full cost of NNDR reliefs would fall to SSDC, full rate retention is planned to come in to force in 2019/20.
- The revised NNDR relief scheme members agreed in 2014 was based on some principles, everyone should contribute something (with only a couple of exceptions) and that the discretionary relief should only provide support to those that need it and encourage self-sustainability, if the scheme is altered these original principles will not stand.
- Looking at the Council Plan should we be looking to protect our rural services and if so does that mean ensuring they receive the same relief as their competitors who are not in rural settlements?
- Longer term business rates could be more valuable/cost effective supporting employment, community value and health and wellbeing.
- Looking at pubs there are 61 across the district all of which are privately owned that have a RV below £12,000 of these 15 are in a rural settlement and would therefore not get the 100% relief in the form of Small Business Rates relief. To top the mandatory reliefs up to provide a 100% would be approximately between £25,000 and £30,000.
- The RV of pubs is worked out differently from other businesses, with regard to pubs they look at sales and how well the business is doing, not the floor space, and the use to which it is put.

- With many businesses receiving additional relief it could be an excellent opportunity for a form of intervention from ED with the Growth Hub and partners to encourage those small businesses to take up some business advice and consider how best to use this additional money. James Gilgrist has offered to consult his colleague Mike Bartlett – Business Support Officer on how to take this forward.

All members present agreed unanimously to recommend the policy was amended to provide those business, organisations and charities that have an RV below £12,000 and are in receipt of a mandatory rural or charitable relief a top up equivalent to Small Business Rate Relief where they would meet the qualifying criteria for that relief. This was necessary to prevent inequality across the district, avoiding rural businesses and Charitable Organisations being disadvantaged.

Following the Autumn statement and the change to grant a 100% Rural rate relief from 1 April 2017 members now recommend that the policy is amended so charities that have an RV below £12,000 and are in receipt of Mandatory Charitable relief receive a top up equivalent to Small Business Rate Relief where they would meet the qualifying criteria for that relief.

Summary of Recommendations

1. The policy is amended so charities that have an RV below £12,000 and are in receipt of Mandatory Charitable relief receive a top up equivalent to Small Business Rate Relief where they would meet the qualifying criteria for that relief from 1 April 2017 onwards.
2. Economic Development Business Support officers examine how to potentially capitalise on the enhancement of small business rate relief with the Growth Hub and partners to encourage those small businesses to consider some business advice to further develop and grow their business.
3. The policy is reviewed annually to ensure it is achieving its objectives, specifically access the impact of the changes recommended in this report and the costs attributed to assessing the financial need for discretionary relief.

Appendix 1 Principles that underpin the SSDC NNDR Discretionary Relief policy

1. Provide assistance only when there is evidence of financial need.

The Group took into account that in most cases the ability to pay is not considered and therefore it is questionable as to whether public funds are being used in the best way. It was also agreed that awards of relief should be proportionate to income. The recipient in some cases should demonstrate that appropriate effort was being made to make the business/group sustainable.

2. The policy should support business, charities, organisations and groups that help to retain services in rural areas.

It was agreed that SSDC should support retaining services in rural areas to prevent the potential detrimental effects of rural isolation on business organisations, charities and communities. The Group outlined the importance of enabling services to be locally accessible to residents especially in areas with limited public transport.

3. Help and encourage business, charities, organisations, groups and communities to become self-reliant.

The Task and Finish Group concluded that for some recipients there was an expectation and a dependency on the local authority for NDR Reliefs. Many of these businesses and Groups could become more self-reliant with some advice and assistance. Any recipient should demonstrate that appropriate effort was being made to make the business/group sustainable.

4. Awarding discretionary relief should not distort competition

The Task and Finish Group agreed that it was important to maintain competition on the high street, and there should not be an unfair advantage given to some over others. The Task and Finish Group did take into consideration the advantages of charity shops in that they have filled empty shops, their recycling agenda, and that they have created employment. However, they do currently create a distortion in competition because of their ability over other shops to considerably lower their overheads through NDR Relief. It was also noted that Charity Shops receive 80% mandatory relief at present and it was agreed that this support is sufficient without additional support from SSDC's taxpayers.

5. Every business/ organisation should contribute something towards the provision of local services.

The policy should be fair for all persons liable to pay NDR and considers the interest and needs of the residents/tax payers of South Somerset. This principle also brings businesses, organisations, and charities in line with the principle agreed as part of the Council Tax Reduction Scheme that every household should contribute to the cost of local services.

Agenda Item 9

Review of Discretionary Housing Payments Policy

Executive Portfolio Holder: Peter Seib, Finance and Legal Services
Assistant Director: Donna Parham, Assistant Director (Finance and Corporate Services)
Service Manager: Ian Potter, Revenues and Benefits Manager
Lead Officers: Ian Potter, Revenues and Benefits Manager, Revenues and Benefits
Contact Details: ian.potter@southsomerset.gov.uk or 01935 462690

Purpose of the Report

1. *To request that the District Executive approve the revised Discretionary Housing Payment Policy*

Forward Plan

2. This report appeared on the District Executive Forward Plan with an anticipated Committee date of 2 March 2017.

Public Interest

3. Discretionary Housing Payments (DHPs) were introduced in 2001 and are designed to provide additional support towards housing costs. Generally this is to help top up the difference between Housing Benefit (HB) entitlement and the rent charged. Government funding for DHP's has increased in recent years to mitigate some of the impact of the Welfare Reform programme.
4. Universal Credit was introduced in part of South Somerset in October 2016 and will be rolled-out across the rest of the district in April 2017. Universal Credit, which applies only to working age people, replaces six benefits including Housing Benefit. Universal Credit recipients who have a housing cost element can apply to the Council for a Discretionary Housing Payment for additional help with their housing costs.

Recommendations

5. The District Executive is requested to:
 - a) approve the revised Discretionary Housing Payment Policy to come in to effect on 1 April 2017;
 - b) Note the Discretionary Housing Payment Policy Overview and Scrutiny Committee Task and Finish Group findings and recommendations for the policy revision attached at Appendix A

Background

6. Discretionary Housing Payments (DHPs) were introduced in 2001 and are designed to provide additional support towards housing costs. DHP funding was increased from 2011/12 to 2013/14 to assist with the transition of claimants into the new welfare entitlement that resulted from the Housing Benefit (HB) related welfare reforms.
7. In 2014/15 and 2015/16 funding levels reduced in line with the transitional nature of the additional funding and as claimants adjusted to the reforms.
8. To help councils manage the impact of the HB reforms announced in the Summer Budget 2015, the overall DHP funding is £150 million for 2016/17. This is an increase of £25 million

(20%) compared to 2015/16 funding. This comprises of funding for four separate areas of support; Core funding, Local Housing Allowance (LHA), Removal of the Spare Room Subsidy (RSRS) and changes to the overall Benefit Cap threshold.

9. The distribution of the DHP funding is based on the estimated effect of each element on individual councils.

Funding DHP's

10. Each year the Government determines how much it will allocate to each council to contribute to the cost of DHP awards. Councils can top up this funding from its own financial resources up to a maximum of 2.5 times the Government grant.
11. For the current financial year 2016/17 the Government grant for South Somerset D.C. is £217,432. The Council can top this up by a maximum of £326,147, taking the overall possible spend limit to £543,578.
12. The DHP funding information for 2017/18 has not yet been announced by DWP.

DHP application decision making

13. Benefit Officers generally make awards based on assessing income and expenditure, but also have the ability to exercise discretion to take into account other factors, for example pregnancy or property adaptation requirements.
14. In line with the regulations and guidance, each application received is judged on its own merits in terms of whether to make an award, the level of award and the duration of the award.
15. One of the key objectives of the policy review was to provide a framework for judging the reasonableness of a range of expenditure elements taking into account certain factors such as household make up and health issues, while retaining discretion to deviate from the framework where appropriate to take account of individual circumstances.
16. The work carried out as part of this review and the resulting policy amendments will support officers in making decisions that are more consistent, introduces some objectivity in assessing the applications while recognising there is also a subjective element to the decision making.

Recommendations of the Discretionary Housing Payment Policy Overview and Scrutiny Committee Task and Finish Group

- That no provision should be made within the MTFP for exceeding the Government's allocation for funding the administration of DHPs, but that this situation be monitored and reviewed on an annual basis to ensure budgets accurately reflect demand;
- members recommend that an annual report is submitted to Scrutiny, to fit in with the budget setting process, showing levels of expenditure against the allocated funding;
- That all literature produced in connection with the DHP Process is reviewed to ensure it meets organisational standards in terms of Plain English and accessibility;
- That measures are introduced to ensure staff administering the DHP scheme are supported;
- That SSDC actively engages with Taunton Deane Borough Council and West Somerset District Council when they have the annual review meeting with Citizens Advice to agree the reasonable living expenses levels

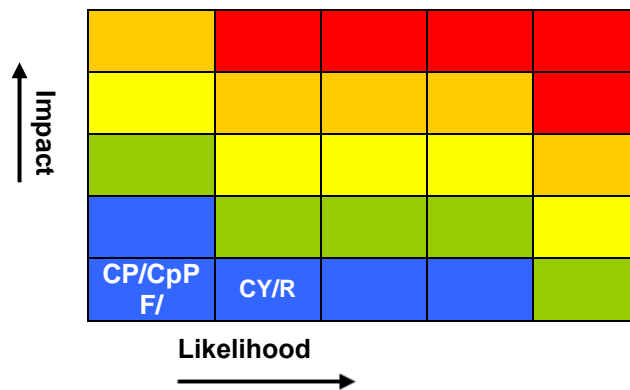
17. The Revenues and Benefits Manager has agreed to implement these recommendations.

Financial Implications

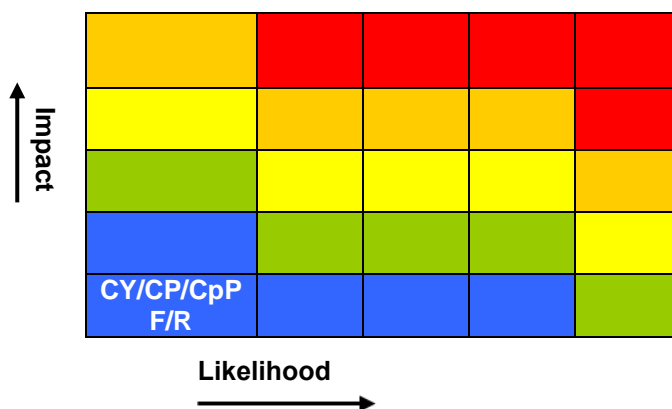
18. There are no anticipated financial implications of the policy revision. DHP spend is demand led and therefore subject to a range of external factors. This has meant that in some years spend has been below Government grant and others a small top up by SSDC has been needed. In 2016/17 we are projecting spend will be within Government grant. The Policy review mainly focuses on consistency in determining allowable levels of household expenditure and it is anticipated that spend for 2017/18 will also be covered by Government grant. DHP spend is already monitored monthly by the Revenues and Benefits Manager which includes a projected annual spend.

Risk Matrix

Risk Profile before officer recommendations



Risk Profile after officer recommendations



Key

Categories	Colours (for further detail please refer to Risk management strategy)
R = Reputation	Red = High impact and high probability
CpP = Corporate Plan Priorities	Orange = Major impact and major probability
CP = Community Priorities	Yellow = Moderate impact and moderate probability
CY = Capacity	Green = Minor impact and minor probability
F = Financial	Blue = Insignificant impact and insignificant probability

Council Plan Implications

Health and Communities - Support residents through national benefit changes including Universal Credit.

Carbon Emissions and Climate Change Implications

None associated with this report

Equality and Diversity Implications

An equalities impact has been carried out as part of this policy review and there are no adverse implications associated with the proposed policy revisions.

Privacy Impact Assessment

None associated with this report

Background Papers

The Department for Work and Pensions Discretionary Housing Payment guidance manual: December 2016 can be accessed at www.gov.uk/government/publications/discretionary-housing-payments-guidance-manual



Discretionary Housing Payment Scheme Policy

Effective from 1 April 2017

SECTION 1

POLICY

BACKGROUND

From 2 July 2001, exceptional circumstances and hardship payments were abolished and replaced by the Discretionary Housing Payment (DHP) scheme. This gave Local Authorities new powers to top up Housing Benefit.

The legislation governing DHPs can be found in the Discretionary Financial Assistance Regulations 2001 (SI 2001/1167).

The DHP scheme provides discretionary support for shortfalls between eligible rental liability and Housing Benefit/Universal Credit and help towards housing costs. Housing costs can be interpreted more widely to include rent in advance, deposits or other lump sum costs associated with a housing need such as removal costs.

The overall spending on DHPs is cash-limited by the Secretary of State under a Permitted Totals Order.

The main features of the DHP scheme are:

- The scheme is discretionary - a claimant does not have a statutory right to a payment;
- The Revenues & Benefits Service decides how the scheme is administered;
- The overall outlay on DHPs is cash-limited by the Secretary of State;
- DHPs are not a payment of Housing Benefit.

However, the claimant must be entitled to at least the minimum payment of Housing Benefit/Universal Credit in the benefit week for which it awards a DHP;

- DHPs should be seen as an emergency fund. They are not and should not be considered as a way round any current or future entitlement restrictions set out under Housing Benefit/Universal Credit legislation;
- DHPs cannot be used to offset overpayment recovery or to cover ineligible service charges.

The Department for Work and Pensions provides us with a specified Discretionary Housing Payments allocation that can vary each year as it is partly based upon our previous Discretionary Housing Payments spending.

We must return any unspent funding to the Department for Work and Pensions. During the year in question, we can only award Discretionary Housing Payments up to a cash limit of two and a half times this annual allocation. Any spending we make above the allocation and up to the legal limit has to be funded by us from our budget (and so in turn from our Council Tax payers).

PURPOSE

This policy has been designed to ensure all people making an application for a DHP are treated in a consistent and equitable manner. This policy has been written to:

- Set guidelines for the factors to be considered in determining an application
- Set out the delegated authority to award a DHP in appropriate circumstances
- Establish an appeals procedure for applicants dissatisfied with a decision
- Safeguard the interests of the local taxpayers to ensure DHP awards are used effectively and economically
- Specify how the Revenues & Benefits Service will manage the DHP scheme and to suggest some of the factors we will consider when deciding to award additional help.

We will treat each case strictly on its merits and all eligible customers will receive equal and fair treatment. Principles of reasonableness will apply in all cases with the Council deciding each case on relevant merits.

The Revenues & Benefits Service is committed to working with the local voluntary sector, social landlords and other interested parties in the Borough to maximise claims for all available state benefits and will reflect this in running the DHP scheme.

The Revenues & Benefits Service is committed to the equitable operation of the DHP scheme. Where the evidence provided shows the customer is not claiming another state benefit they may be entitled to, we will advise them to make such a claim and provide details of other agencies in the District who may be able to help. Similarly, if a customer is not claiming a Council Tax Discount to which they may be entitled we will advise them to firstly make such a claim.

STATEMENT OF OBJECTIVES

The Revenues & Benefits Service will consider awarding a DHP to all customers who meet the qualifying criteria set out in this policy. We will treat all applications on their individual merits, and will seek through this policy to:

- Alleviate poverty;
- Allow a short period of time for someone to adjust to unforeseen short-term circumstances and by providing a DHP to enable them to “bridge the gap” during this time;
- Support domestic violence victims who are trying to move to a place of safety
- Help people who live near their jobs because they work unsocial hours/split shifts or where there is inadequate public transport;
- Help people who as a consequence of a move have extra travel to work costs;
- Sustain tenancies to prevent homelessness;
- Support vulnerable young people in the transition to adult life;
- Encourage residents to get and keep employment;
- Safeguard residents in their homes;

- Help those who are trying to help themselves;
- Keep families together;
- Assist those with medical or health problems where they need access to medical services or support that would not be available elsewhere
- Act as a tool in supporting vulnerable people in the local community;
- Help customers through personal crises and difficult events.

This list is not exhaustive and we will consider any other relevant factors or special circumstances that may apply.

A DHP can help meet shortfalls in areas such as:

- Restrictions in Housing Benefit entitlement because the rent payable is more than the rent used to work out Housing Benefit/Universal Credit;
- Non dependant deductions;
- Income tapers;
- Increases in essential work related expenditure such as increased fares to work if a customer has had to move because they could not afford to live in proximity to their work following a reduction in their Housing Benefit.

The DHP scheme allows for payments to be made for rent deposits and rent in advance if the claimant receives Housing Benefit for their present home, however, budget limitations and increasing demand in the face of recent and on-going welfare reforms mean that SSDC is not able to make awards in these circumstances.

A DHP cannot help with the following:

(a) Certain elements of the rent:

- Ineligible service charges as specified in Schedule 1 of the Housing Benefit Regulations 2006 and Schedule 1 of the Housing Benefit (Persons who have attained the qualifying age for pension credit) Regulations 2006
- Increases in rent due to outstanding rent arrears;

(b) Suspensions

- Where a person's Housing Benefit or any other benefit has been suspended, it is not appropriate to pay a DHP. The aim of the suspension provision is to act as a lever to ensure the customer provides necessary information or evidence – paying a DHP could reduce the effectiveness of this lever.

(c) Sanctions

- Where a reduction has been applied to Income Support or income-based Jobseeker's Allowance due to a Reduced Benefit Direction for failing to comply with the Child Support Agency, the claim for a DHP should assume such a sanction has not been applied;

- Where a reduction has been applied because of absence at a work-focussed interview, the claim for a DHP should assume such a sanction has not been applied;
- Any restriction in benefit due to a breach of a Community Service Order Priority Groups.

We will prioritise DHPs for customers who are in our opinion, the most vulnerable. This will particularly include, although not be limited to:

- Claimants who have someone who is pregnant within their household
- Young adults who have recently left the care system
- Households containing adults or children with disabilities
- Households with children under 5 years of age
- Claimants who are carers
- People who are fleeing domestic violence
- The elderly who would find it particularly difficult to move house
- People accepted as homeless under homelessness legislation of the Housing Act 1996 and placed in temporary accommodation by the Council as described in regulation A13(3), because they are homeless or to prevent homelessness
- Customer classified as vulnerable in line with our Vulnerability Policy
- Being in one or more of the above groups does not guarantee a DHP award.
- For those applying for a DHP on the grounds of exceptional hardship we would expect the customer to demonstrate they have taken steps to try to address their financial difficulties by seeking money / debt advice from the CAB, National Money Advice Helpline or similar organisations.

FRAUD

The Council is committed to the fight against fraud in all its forms. A claimant who tries to fraudulently claim a DHP or DCTA by falsely declaring their circumstances, providing a false statement or evidence in support of their application, may have committed an offence under the Theft Act 1968. Where we suspect such a fraud may have occurred, the matter will be investigated and this may lead to the instigation of criminal proceedings.

PUBLICITY

The Revenues & Benefits Service will publicise the DHP scheme and will work with all interested parties to achieve this. A copy of this policy will be made available for inspection and will be posted on the South Somerset District Council web site.

Information about the amount spent will not normally be made available except at the end of the financial year.

MONITORING DHP EXPENDITURE

The Revenues & Benefits Service will extract reports from the DHP software on a monthly basis to ensure expenditure is within budget and is correctly profiled to ensure no overspend at the end of the financial year.

SECTION 2

ADMINISTRATION

CONDITIONS THAT MUST BE MET

A claim for a DHP must be in writing and signed by the customer. A letter or signed statement received by the Council's Revenues and Benefits Service will be sufficient if the following conditions are met:

- On request the customer supplies any relevant supporting evidence.
- The Revenues & Benefits Service may ask for any (reasonable) evidence in
 - support of an application for a DHP. The Revenues & Benefits Service will make such requests in writing. The customer will provide the evidence within one month of our letter, although we will extend this in appropriate circumstances.
- If the customer is unable to or does not provide the evidence, we will still consider the application and take into account any other available evidence including that which we already hold.
- The Revenues & Benefits Service reserves the right to verify any information or evidence provided by the customer in appropriate circumstances.

In considering an award for a DHP, the following criteria must be met:

1. The claimant is entitled to Housing Benefit/Universal Credit
2. The payment is for costs that are potentially eligible for Housing Benefit/Universal Credit
3. The sum of a DHP and the benefit does not exceed the overall liability (except for lump sum awards)

4. A DHP is not used to plug an income gap caused by sanction or suspension to Social Security Benefits

CUSTOMER RESPONSIBILITIES

A person claiming a DHP must be willing to undertake all of the following:

- (a) Provide the Council with such information as it may require to make a decision;
- (b) Tell the Council of any changes in circumstances that may be relevant to their on-going claim; and
- (c) Satisfy the Council they are not able to meet their eligible housing costs;
- (d) Accept assistance from either the Council or third parties such as the Citizens Advice Bureau (CAB) or similar organisation to enable them to manage their finances more effectively including the termination of non-essential expenditure; renegotiate priority and non-priority debts, provide an income and expenditure statement or Financial Statement and if needed allow the Authority to seek for the claimant by completing a Common Referral Statement
- (e) Work with the Council in identifying potential changes in payment methods and arrangements to assist in alleviating their current circumstances;
- (f) Demonstrate they have taken all reasonable steps to meet their rental liability including applications for employment or additional employment, or alternative lines of credit;
- (g) Have no access to assets that could be realised and used to pay housing costs;
- (h) Maximise their income through applying for other welfare benefits, cancellation of non-essential contract and outgoings and identifying the most economical tariffs for the supply of utilities and services generally.

AWARDING A DHP

The Council will be responsible for assessing applications against this policy and an officer will consider the following factors in applying this policy:

1. Current household composition and specific circumstances including disability or caring responsibilities;
2. Current financial circumstances and customers living in remote and isolated communities

3. Determine what action(s) the applicant has taken to alleviate the situation;
4. Consider alternative means of support may be available to the applicant by:
 - Re-profiling debts;
 - Applying for Discretionary Reduction in Council Tax Liability (where applicable);
 - Maximising other benefits
 - Determining whether in the opinion of the decision maker, the spending priorities of the applicant should be re-arranged
 - Determining what steps the customer plans to take in preparation for when the discretionary award ends.

In deciding whether to award a DHP, the Revenues & Benefits Service will consider:

- The shortfall between Housing Benefit/Universal Credit and the housing costs;
- If there is a real risk of eviction because of the shortfall, or will the landlord accept a reduced payment?
- The age of the customer
- The locality of the property and the demographic nature for rural communities
- Any steps taken by the customer to reduce their housing costs;
- The financial and medical circumstances of the customer, their partner and any dependants and any other occupants of the customer's home;
- The income and expenses of the customer, their partner and any dependants or other occupants of the customer's home (ignoring any income from Disability Living Allowance (DLA) or Personal Independence Payments (PIP));
- Any savings or capital that might be held by the customer or their family;
- If the customer or anyone in the household has any unusual or unusually large expenses, that make it harder than normal for them to meet the shortfall?
- The indebtedness of the customer and their family;
- The exceptional nature of the customer and their family's circumstances;
- The amount available in the DHP budget at the time of the application (in accordance with the Permitted Totals Order);
- If this is a repeat request for a DHP? If so what action has the customer taken to alleviate the problem since the last application?
- The possible impact on the Council of not making such an award, for example the pressure on priority homeless accommodation;
- Any other special circumstances brought to the attention of the Revenues & Benefits Service.

The Revenues & Benefits Service will decide how much to award based on all the circumstances. This may be an amount below the difference between the housing costs and the Housing Benefit/Universal Credit award.

Granting a DHP does not guarantee or imply a further award even if the customer's circumstances do not change.

To ensure a consistent approach when determining a discretionary award the Authority will also follow guidelines as advised by "**The Office of National Statistics**". We have also consulted with a range of local partners to identify agreed levels of notional household spending that are as follows:

The Authority will allow expenditure as follows:

Fuel, power, insurances	To include electricity, gas, oil, building and contents cover	£12.50
Food and Household	To include food, toiletries, laundry, clothing, footwear, pet food, nappies	£30.00
Health	Dentist, glasses and prescriptions	£1.00
Transport	Car Tax, MOT, fuel, insurance, bus fares, taxis	£12.00
Communications	Mobile phone, internet, landline, TV Licence	£10.00
Miscellaneous	Repairs, hairdressing, hobbies, leisure	£8.00
	Total weekly expenditure:	£73.50

The Authority will also allow the following expenditure in full:

Maintenance paid for a child or former partner	Actual expenditure
Rent liability	Actual expenditure
Council Tax liability	Actual expenditure
Water Rates	Actual expenditure
Court Fines and negotiated financial repayments	Actual expenditure

The trigger point level will be multiplied by the household factor by The Office of National Statistics. These are:

Type of Household member	Equivalence Value
First Adult	1.0
Additional adult	0.5
Child aged: 14 and over	0.5
Child aged:0-13	0.3
Adult aged under 25 (not set by ONS)	0.8

Taking account of DWP and allowances for adults under 25 we will include a household factor multiplier of 0.80.

For example, if a household is made up of a Couple and the allowable notional expenditure for an item such as food is £30 the household factor would be 1.5 (1.0 plus 0.5) allowing £45 a week for food.

Any expenditure at or below the trigger point for allowable expenditure will be permitted. Any expenditure in excess of the trigger point will not automatically be considered. The applicant will need to prove their level of spending is essential, reasonable and unavoidable. We may also request to see medical letters and supporting bank statements.

The decision maker has the discretion to exceed the trigger point or actual expenditure where it is reasonable to do so.

PERIOD OF AWARD

The Revenues & Benefits Service will decide the length of time to award a DHP from the evidence supplied and the facts known.

The start date of an award will normally be:

- The Monday after we get the written claim for a DHP; or
- The date Housing Benefit (HB) or Universal Credit starts (providing we get the application for the DHP within one month of the decision on the claim for HB whichever is the earlier, or the most appropriate).
- We cannot award a DHP for any period outside an existing Housing Benefit period granted under the Housing Benefit statutory scheme. The minimum award of a DHP is one week.
- We will not normally award a DHP for a period over 6 months and will review all awards on a 6 monthly basis.
- We will consider any reasonable request for backdating an award of a DHP but will usually limit such consideration to the current financial year

CHANGES OF CIRCUMSTANCES

The Revenues & Benefits Service may need to revise an award of a DHP where the customer's circumstances have materially changed. Any revision to the award will take effect from the Monday following the date of change in circumstances.

METHOD OF PAYMENT

The Revenues & Benefits Service will decide the most suitable person to pay based on the circumstances of each case. This could include paying:

- The customer;
- Their partner;
- An appointee;

- Their landlord (or an agent of the landlord); or
- Any third party to whom it might be most suitable to pay.

The Revenues & Benefits Service will pay a DHP by the most suitable means available in each case. This could include payment by direct credit to a bank or building society account or by crediting the customer's rent account.

The payment frequency will be advised at the time of the award.

NOTIFICATION

The Revenues & Benefits Service will aim to write to the customer to tell them the outcome of their claim within 14 days of receipt. Where the claim is unsuccessful, we will set out the reasons and explain their appeal rights. Where the claim is successful, the Revenues & Benefits Service will advise:

- The weekly amount of DHP;
- If it is paid in advance or in arrears;
- The period of the award;
- How, when and to whom (for DHP only) it will pay the award;
- The need to report a change in circumstances;

OVERPAYMENTS

The Revenues and Benefits Service can recover a DHP if we decide the payment has been made as a result of misrepresentation or failure to disclose a material fact, either fraudulently or otherwise. We may also recover DHPs if we decide the customer received the DHP as a result of an error made when the application was determined.

We will not recover DHPs from ongoing HB or UC. This is unlike HB overpayments where there is a regulatory provision to allow recovery from ongoing HB.

There is also no provision for recovery of overpaid DHPs from other prescribed benefits. The only method of recovery if a DHP is overpaid is to request repayment of the debt from the customer. This may be in the form of an invoice or using debt collection agencies or via the courts.

SECTION 3

REVIEWS OF DHP DECISIONS

THE RIGHT TO SEEK A REVIEW

DHPs are not payments of Housing Benefit. Therefore they are not subject to the statutory appeals mechanism. The Revenues & Benefits Service will use the following policy for dealing with appeals about a:

- Refusal to award a DHP; or
- Decision to award a reduced amount of DHP; or
- Decision not to backdate a DHP; or
- Decision there has been an overpayment of a DHP.

A customer (or their appointee or agent) who disagrees with a DHP decision may dispute the decision. The Revenues & Benefits Service must receive a request for a review within one month of the issue of the written decision about the DHP to the customer. Where this has not already been done, officers from the Revenues & Benefits Service will explain the DHP decision to the customer by telephone, at interview or in writing and will seek to resolve the matter.

Where agreement cannot be reached, the Revenues & Benefits Appeals Officer will consider the case in consultation with the Revenues & Benefits Manager. A review will be conducted on all the evidence held and a decision made within 14 days of referral or as soon as practicable.

Where the Appeals Officer decides not to revise the original decision, they will tell the customer in writing, setting out the reasons for their decision.

The decision is final and binding and may only be challenged through judicial review or by complaint to the Local Government Ombudsman.

Discretionary Housing Payment Policy Overview and Scrutiny Committee Task and Finish Group Report

Lead Officers: *Ian Potter, Revenues and Benefits Manager*
 Emily McGuinness, Scrutiny Manager

Contact Details: ian.potter@southsomerset.gov.uk or 01935 462690

Purpose of the Report

This report sets out the purpose, methodology, findings and recommendations of the Task and Finish Groups review of the Discretionary Housing Payment Policy to take effect from 1 April 2017.

Actions Required

Scrutiny Committee members are asked to consider the detailed report of the Task and Finish Group and endorse the recommendations to District Executive.



SSDC Discretionary Housing Payment Policy

Report and Findings of the Overview and Scrutiny Task and
Finish Group

February 2017

Foreword

Discretionary Housing Payments (DHPs) were introduced in 2001 and are designed to provide additional support to help top up the difference between Housing Benefit (HB) and the rent charged. Government funding for DHP's has increased in recent years to mitigate some of the impact of the Welfare Reform programme.

The roll-out of Universal Credit (UC) by the Department for Work and Pensions (DWP) will mean support for housing costs will shift from Housing Benefit to Universal Credit. DHP's can be paid to UC recipients where their entitlement contains a housing cost element. Although UC is administered by DWP, DHP's will remain the responsibility of local councils to administer.

Government funding for DHP's is limited and while councils are permitted to top it up from its' own resources there is very limited scope to do so in the current financial climate. It is therefore important to ensure that support is effectively targeted.

The review seeks to ensure there is a clear policy framework that enables officers to make consistent and objective decisions while retaining a sufficient degree of discretion in recognition of the unique circumstances of each applicant.

Introduction

In July 2016, the Scrutiny Committee of South Somerset District Council agreed to establish a Task and Finish Group, in line with the constitutional arrangements, to review the authority's approach to administering Discretionary Housing Payments.

The Task and Finish Group consisted of the following members:

Councillor Jason Baker

Councillor Cathy Bakewell

Councillor Val Keitch

Councillor Sue Osborne

Councillor Sue Steele

This report sets out the results of that review and attached is the draft SSDC DHP policy which encompasses the work of the Task and Finish Group.

Process

The Task and Finish Group met on a monthly basis over a period of four months, during that time they familiarised themselves with the statutory and legislative requirements of the Discretionary Housing Payment scheme, current SSDC policy and practice and sought advice and guidance from other authorities and expert sources including Shelter and CAB.

As part of the process, members considered a number of anonymised case studies of previous DHP applications to demonstrate the various circumstances currently experienced by residents of South Somerset and the very real demand for the additional support provided by the DHP Scheme.

Once members had developed a better understanding of both the national and local context, they held meetings with Shelter South West and South Somerset MIND to ensure any recommendations coming forward would provide the best possible service to customers and not in any way disadvantage them. This work was in addition to looking at examples of best practice from both national and neighbouring local authorities.

In bringing forward the draft DHP Policy and accompanying recommendations, members of the Task and Finish Group are confident that they have conducted a wide ranging and evidence based review.

Reasons for this review

SSDC has a Discretionary Housing Payment Scheme policy that came into effect on 1st June 2014. Since that time, the number of applications for a DHP has increased as the pace of welfare reform has accelerated. This increase has come at a time of reducing budgets – and there is little capacity within SSDC to exceed the funding allocated by Central Government.

Against this background, members of the Scrutiny Task and Finish Group have reviewed the existing policy with a view to recommending a framework within which officers can allocate available funding in the most equitable way to those most in need – the success of an application should not depend on the point in the financial year it is submitted.

Background

Discretionary Housing Payments (DHPs) were introduced in 2001 and are designed to help top up Housing Benefit (HB) entitlement. Funding has increased to cover welfare reforms – but only covers a small part of the losses in HB.

DHP's are partly funded by Government. For 2015/16 the Government contribution for SSDC was £174k. Legislation allows SSDC to spend £463k (which equates to 2.5 times Government Allocation). The additional £262k would have to be found from within existing SSDC budgets. Any spend above this would be considered to be breaking the law.

In 2015/16 SSDC topped up the government allocation by £25k – and made 492 awards.

What are DHP's?

DHPs may be awarded when an LA considers that a claimant requires further financial assistance towards housing costs and is in receipt of a social security benefit which qualifies them for a DHP payment [Housing Benefit and Universal Credit].

The regulations covering DHPs are the Discretionary Financial Assistance Regulations 2001. Guidance associated with these regulations (issued in February 2016) state that whilst the regulations give local authorities broad discretion, decisions must be made in accordance with the principles of good decision making – i.e. administrative law. In particular, LA's have a duty to act fairly, reasonably and consistently. Each case must be decided on its own merits, and our decision making should be consistent throughout the year.

For clarification, Housing Costs in relation to DHPs are not defined in the regulations and so SSDC has a broad discretion to interpret the term. For the purpose of this review, we have

adopted a working principle that the SSDC will consider providing financial assistance if the following factors have created a shortfall between rent and HB (referred to as Housing Costs);

- Benefit cap
- Social Sector Size restriction
- Local Housing Allowance restrictions
- Local reference Rent and Shared Accommodation Rate
- Non-dependent deductions and equivalent in Universal Credit
- To prevent homelessness; and
- Income taper reduction.

DHPs cannot be awarded towards Council Tax liability, ineligible service charges, increases in rent due to outstanding rent arrears and certain benefit sanctions.

Financial Assistance can also be awarded to fund rent deposits and rent in advance to secure tenancies, however, budget limitations and increasing demand in the face of recent and on-going welfare reforms mean that SSDC is not able to make awards in these circumstances.

Agreeing principles

Members of the Task and Finish Group wished to replicate the successful principle established by previous Task and Finish Reviews of meaningful member involvement in reviewing this important policy area.

A primary objective of this review was to ensure that there is consistency in how the team administers DHPs, making the process as objective as possible and removing a reliance on subjective decision making.

Members were asked to consider how much funding SSDC is prepared to allocate in addition to the government's allocation for DHPs.

A key component of assessing DHP applications is assessing expenditure – this Task and Finish Group spent a considerable amount of time establishing criteria for reasonable expenditure. This work involved consultation with local and national advisory agencies such as SHELTER and CAB.

Members agreed that the resulting DHP policy should look beyond the financial assistance that can be provided. The policy should look at other ways in which we can help in providing more long term help, for example by offering budgetary advice, advice on energy suppliers etc. This approach supports the 'self-help' element of Universal Credit.

Members were mindful of the need to consider the level of resources required to adopt such an approach against the potential budgetary benefits of reducing number of applicants.

Current practice

Current practice is governed by the Discretionary Housing Payment Scheme Policy introduced in June 2014

The Revenue and Benefits team currently make awards based on assessing income and expenditure and have the ability to exercise discretion to take into account some exceptions such as pregnancy etc.

In line with the regulations and guidance, each case presented is judged on its merits in terms of whether to make an award, the level of award and the duration of an award.

This approach is in line with the regulations and provides a valuable service to some of our most vulnerable customers. However, the demand for DHPs is increasing as the welfare reforms already introduced start to take effect and with more planned the increase in applications is anticipated to continue.

The purpose of this review has been to revisit the original policy in light of evidence and information gathered over the past 3 years and reassure the authority that the principles of equity and fairness can continue to be upheld.

DHP regulations and guidance leave a lot of the decision making to the discretion of the awarding authority, within broad guidelines. Whilst this allows for local conditions to be reflected, it is felt that there is a need to provide a more formal framework to support officers in exercising that discretion.

Evidence gathering

One of the primary concerns of members undertaking this review was to introduce an evidence based approach as far as possible. Members acknowledged that those officers administering the DHP process are continually asked to make judgments on the expenditure choices of applicants. When applying for a DHP, applicants are asked to complete the form attached at Appendix A. Officers then base their decisions on this information – currently there are no guidelines as to what constitutes ‘acceptable living allowances’ and officers could make different judgements – each entirely valid, but not effectively contributing to consistent decision making. Members were also conscious of the strain this could potentially put on officers, asking them to effectively judge the lifestyle choices of applicants.

In response to these issues, members sought the advice of national and local interest groups who support those most vulnerable in our communities, including CAB and Shelter. The Task and Finish Group were grateful to Vicki Sampson – Service Manager - Shelter South West who attended a meeting and provided invaluable advice and guidance to members.

Members’ focused on trying to establish a basis for reasonable living expenses. In pursuit of this, members considered various case studies provided by Shelter which demonstrated the very real day to day issues affecting potential DHP Applicants.

Before looking at detailed living expenses, members agreed a set of principles that they believe should underpin the DHP Policy.

In his paper presented to the European Consumer Debt Network in 2010, Nordenankur made the following statement about what constitutes a reasonable standard of living and advocates that this becomes the accepted position underpinning any related assessment activity.

“A reasonable standard of living should be seen to meet the physical, psychological and social needs of an individual– not to levels of luxury but similarly not at a subsistence level. Individuals in receipt of assistance should be able to :

- *participate in the life of the community as other citizens do;*
- *eat nutritious food, have clothes for different weathers and situations;*
- *keep a clean and tidy home;*
- *have furniture and equipment at home for rest and recreation;*
- *be able to devote some time to leisure activities, to read books and watch television “*

The Task and Finish Group supported this principle but added the caveat that it should be upheld within the context of the need to administer a fair and equitable scheme that represents the interests of all parties – including Council Tax payers who are not DHP recipients.

Members of the Task and Finish Group were reminded that currently, decisions on ‘reasonable living expenses’ are made subjectively by officers. Members have made some recommendations to support officers in this decision making – whilst acknowledging that it will be impossible to provide a hard and fast set of rules, but a general set of ‘reasonable’ costs should be achievable.

What constitutes a Reasonable Standard of living?

Detailed ‘reasonable living costs’

The most commonly available data relating to what constitutes reasonable living expenses for assessment purposes to relate to IVA (bankruptcy agreements) provided members with an initial basis for drawing up SSDC Guidelines for reasonable living expenses.

The following guidance is taken from the Government’s Money Advice Service Website and whilst again it is intended to advise those applying for bankruptcy, it provides a useful point of reference.

Essential and allowed expenditure – a rough guide

- **Rent**
- **Monthly utility bills** – *This will include essentials such as gas and electricity as well as water rates*
- **Council Tax**
- **Food and toiletries** – *The amount allowed for an individual is £200 per month. Where there is a couple, it is £300. For each child in the household, this amount would increase by £80. This includes food, toiletries and cleaning products.*
- **Fuel allowance** – *the allowance is usually up to £160, however, more may be permitted if it can be justified (for example for work purposes)*
- **Insurance** – *This can include buildings and contents insurance or car insurance.*

- **Child Maintenance** – the amount allowed for child maintenance is variable.
- **Rented goods** – this could include washing machines, fridge etc
- **Dental and optical** - there is a limit of £10 for an individual and £15 for a couple. As children are usually treated for free, there is no additional allowance.
- **Clothing** – depending on the number of individuals in the household, this amount will vary. For an individual, there is a limit of £25 per month, a couple are allowed £40 per month and for each child there is an additional £10.

Expenses that would not be considered essential or allowed:

- **Satellite or cable TV** - although in some circumstances, this may be considered acceptable if the monthly amount is reasonable
- **Private health insurance**
- **Memberships**
- **Charitable donations.**

Local Authority Examples

As with all Scrutiny activity, examples of existing best practice from other local authorities administering DHP's was sought. Members identified an example of good practice at neighbouring authorities, principally Taunton Deane and West Somerset. Members would like to thank those authorities for their help and advice with this review.

The table of reasonable expenses included in the draft policy (and set out below) is the same set of figures used by TDBC and WSC and has been drawn up in consultation with the CAB and Engage West Somerset – an umbrella body representing the charitable sector in the West of Somerset. The figures are revisited annually and a recommendation of this Task and Finish Group is that SSDC engages in this annual revision process, and in doing so ensures that as far as possible there is a consistent approach to administering DHPs across Somerset.

The Authority will allow expenditure for:

Fuel, power, insurances	To include electricity, gas, oil, building and contents cover	£12.50
Food and Household	To include food, toiletries, laundry, clothing, footwear, pet food, nappies	£30.00
Health	Dentist, glasses and prescriptions	£1.00
Transport	Car Tax, MOT, fuel, insurance, bus fares, taxis	£12.00
Communications	Mobile phone, internet, landline, TV Licence	£10.00
Miscellaneous	Repairs, hairdressing, hobbies, leisure	£8.00
	Total weekly expenditure:	£73.50

The Authority will also allow the following expenditure in full:

Maintenance paid for a child or former partner	Actual expenditure
Rent liability	Actual expenditure
Council Tax liability	Actual expenditure
Water Rates	Actual expenditure
Court Fines and negotiated financial repayments	Actual expenditure

The trigger point level will be multiplied by the household factor by The Office of National Statistics. These are:

Type of Household member	Equivalence Value
First Adult	1.0
Additional adult	0.5
Child aged: 14 and over	0.5
Child aged:0-13	0.3
Adult aged under 25 (not set by ONS)	0.8

Taking account of DWP and allowances for adults under 25 we will include a household factor multiplier of 0.80.

For example, if a household is made up of a Couple and the allowable notional expenditure for an item such as food is £30 the household factor would be 1.5 (1.0 plus 0.5) allowing £45 a week for food.

Any expenditure at or below the trigger point for allowable expenditure will be permitted. Any expenditure in excess of the trigger point will not automatically be considered. The applicant will need to prove their level of spending is essential, reasonable and unavoidable. We may also request to see medical letters and supporting bank statements.

The decision maker has the discretion to exceed the trigger point or actual expenditure where it is reasonable to do so.

South Somerset MIND

In addition to seeking external, expert advice from Shelter, CAB and other authorities, members were aware of the mental health implications of this policy area and so met with Alex Priest, CEO of South Somerset MIND. Alex considered the draft proposals of the Task and Finish Group and was satisfied that due regard had been paid to the needs of customers with mental health needs.

In particular, he felt that there was adequate provision in the policy to meet transport costs – an issue of vital importance in a rural community such as South Somerset where rural isolation and loneliness are significant contributors to poor mental health. In connection with this, members discussed expenditure on Television packages. It was the view of MIND that for some individuals in rural locations, TV could provide the only human voices they hear for long periods of time and should be seen as contributing to their mental wellbeing. In

recognition of this, members have recommended that an allowance is provided for television within the Reasonable living expenses guidelines, but that it should be recognised that Freeview television provides a very good service.

Providing Advice and support

All of the external sources members spoke to reinforced the importance of focusing on the right of the individual to make their own choices about how to live their lives. Particularly in respect of those with mental health needs, removing this right to choose could be very detrimental.

Making appropriate lifestyle and budgeting choices are examples of the individual's ability to choose, however this was also highlighted as a particular concern by the expert witnesses members spoke with. The most vulnerable members of our community often have a chaotic approach to financial management and are not familiar with the practice of comparing service providers, especially in terms of utility companies.

Ideally, members would like SSDC to provide more in-depth 'money management' advice to applicants – supporting them in making lifestyle and financial decisions which will lead to long term improvements in their situations. However, members accepted that current budget pressures do not allow for this and so recommend that as part of the application and assessment process, SSDC Officers sign post applicants to the CAB, under the provision of our current agreement.

The issue of expenditure on tobacco and alcohol was debated at length. There is an argument that this is a lifestyle choice and ensuring rent can be paid could be considered as a higher priority. However, in discussions with South Somerset MIND, members were reminded of the mental health implications of substance dependency. Whilst there are obvious physical and mental health benefits from reducing alcohol and tobacco usage, it is often part of a complex situation and SSDC would be better advised to signpost applicants to support services, again initially via CAB.

Members were keen to stress that whilst the policy they are recommending has a framework within which officers can assess DHP awards, there is still provision for discretion to be exercised and for each case to be treated on its merits.

One of the principles members agreed upon at the start of this review was to support the national programme of incentivising work and to reduce reliance of benefit support. Therefore, the Task and Group are recommending that in addition to the above advice, applicants are also signposted to other sources of welfare benefit advice – where applicable.

With this in mind, members have made clear reference within the draft policy to the duration of awards. In order to maintain the original intention of DHP's being available to alleviate short term issues and should not be seen as a regular and permanent source of income. To this end, members are recommending that awards are made for a maximum of 6 months, after which period the situation will be reviewed.

Supporting SSDC Officers

In drafting the recommended policy, members were aware of the role of the Revenues and Benefit's Team in the successful implementation. As far as possible, members have met the brief of providing a sound, evidence based framework within which officers can make consistent decisions. However, there remains a necessary element of discretion, recognising the 'human' aspect of the scheme and members were aware of the need to provide additional support to those officers exercising their judgement and discretion. This will be investigated by the Revenues and Benefits Manager.

Funding DHPs

As agreed in the review objectives, members of the Task and Finish Group considered the issue of funding DHPs in the future. Whilst noting theoretically that SSDC can contribute an additional £326k per year to fund DHPs, in reality, the funding does not exist to do this and therefore, they recommend that the intention should be for spending to remain within the government allocation.

By introducing a more robust policy, with clearer guidelines, members believe that SSDC will have a demonstrably fair, equitable and consistent approach to administering DHPs which should result in the available funding being distributed to those most in need. The introduction of a more rigorous approach to monitoring the duration of awards should also support this.

However, members also believe that if an application for a DHP meets the criteria as set out in the policy, an award should be made even if the allocated funding had been spent. Should this situation arise, there will be an inevitable impact on budgets. To address this potential risk to SSDC finances, members are recommending that the situation is closely monitored for the initial 12 months after the adoption of the policy and that a report is submitted to Scrutiny showing expenditure against allocated budgets. If the **evidence** shows that the available funding is not sufficient to meet the needs of our customers, then the issue will need to be revisited as part of the budget setting process with members discussing priority spending areas and possible application to contingency funds.

Equality Considerations

Jo Morgan, the SSDC Equalities Officer has been actively involved at all stages of the review, attending meetings and advising on the completion of the Equalities Impact Assessment

Conclusions

Based on the work carried out and detailed above, the Task and Finish Group are recommending the attached draft policy for adoption along with the following recommendations:

Draft policy for recommendation :

- That the draft policy attached at Appendix A is recommended to Council for Approval.

- That no provision should be made within the MTFP for exceeding the Government's allocation for funding the administration of DHPs, but that this situation be monitored and reviewed on an annual basis to ensure budgets accurately reflect demand. Members recommend that an annual report is submitted to Scrutiny, to fit in with the budget setting process, showing levels of expenditure against the allocated funding.
- That all literature produced in connection with the DHP Process is reviewed to ensure it meets organisational standards on terms of Plain English and accessibility;
- That measures are introduced to ensure staff administering the DHP scheme are supported;
- That SSDC actively engages with Taunton Deane Borough Council and West Somerset District Council when they have the annual review meeting with CAB to agree the reasonable living expenses levels;

South Somerset District Council

Application For Discretionary Housing Benefit/Council Tax Reduction Payment

If you require further information on completing this form, please telephone (01935) 462462. You can also get help at the following Council Offices (please check website for opening times):

The Council Offices Petters House Office
Brympton Way, Yeovil Petters Way, Yeovil

Churchfields Office Crewkerne Community Office
Churchfields, Wincanton Town Hall, Market Square, Crewkerne

Chard Community Office Langport Information Centre
Holyrood Lace Mill, Holyrood Street, Chard Bow Street, Langport

Ilminster Community Office
North Street, Ilminster

What happens after you submit your form?

If you have provided an email address, we will email you on submission of the form. However if you have not provided an email address we will post confirmation of receipt of your online form. If you have not received your receipt in 7 days please contact us.

Once a decision has been made using the information you have provided we will send you a letter with our decision.

These awards will remain the same for the period awarded as long as your circumstances do not change.

CHANGES IN YOUR CIRCUMSTANCES

If there is a change in the circumstances of your claim you must tell us immediately. You can report the changes online, by email, telephone or in writing and we will advise you if you need to provide us with more information or evidence. Do not rely on someone else to give us the information or to pass a message; not even the Job Centre, Pension Service or Revenues and Customs. Our contact details are above.

For Official Use Only

Title	Customer Name	Form Filename	DHP Application Form (1.0).wdf
<input type="text"/>	<input type="text"/>	Form Reference	<input type="text"/>
DOB	NINO	Notes	V1
<input type="text"/>	<input type="text"/>	<div style="border: 1px solid black; height: 200px;"></div>	
TEL	<input type="text"/>		
Email	<input type="text"/>		
Customer Address	<div style="border: 1px solid black; height: 60px;"></div>		
Date Form Started	10/02/2017 16:42:23		
Date of E-signing	<input type="text"/>		
Date Submitted	<input type="text"/>		
Data Validation Ref	<input type="text"/>		
Occupancy type	<input type="text"/>		
Advisor Name (who started form)	<input type="text"/>		
Mr Simon Cox	Claim Num / Ref	<input type="text"/>	Page 101
Advisor Department	CTax Num / Ref	<input type="text"/>	
none			

Please read these guidance notes before completing your application form.

How to use this online form

This form uses the latest internet technology to make it quick and easy for you to complete and submit an online application. The form will help and guide you through your application and make sure it is filled in correctly. Once opened on the internet, you can fill in and save the form off-line. Reconnection to the internet is only required when submitting the completed form.

You can move between pages by using the **Next** and **Back** buttons, or directly to pages using the **Select Page** menu.

Dates: All dates on this form should be entered in the DD/MM/YYYY format, you should enter numbers using your keyboard separated by the / symbol.



Alternatively you can use the calendar tool to select dates, which appears when you are answering a question that requires a date as an answer.

If you have any difficulty entering or changing a date on the form, please delete the entry and start again

Submitting the form: When you have completed the form and it is free of errors, pressing the **Submit** button will send the data over the internet to us, so that we can begin processing your form immediately.

 Help icons built into the form will also help guide you through the application, for further help in using this form click on the **Help** button on the control panel on the left.

What are Discretionary Payments?

These are extra help for people who receive Housing Benefit and/or Council Tax Reduction and who appear to need further help to meet their payments. These are not intended to be long term ongoing payments; they are awarded on a short term basis while you take action to improve your circumstances.

How do I get Discretionary Payments?

To be considered you must complete this online form and submit this to the Councils' revenues and benefits section along with supporting documentary evidence.

What will I need to tell you?

When you complete the form we will need to know why you think you should get an additional payment towards your rent/Council Tax, what your circumstances are, any action you have taken to help yourself and anything else you think may help us make a decision. You should supply as much detail as possible so that we fully understand your situation.

You will also need to tell us about all the money you have coming into your household (income) and all the money you pay out each week (expenditure) and if possible provide your last two months bank statements.

When you have completed and submitted the form online we will consider all aspects of your circumstances before we decide if we can award you a discretionary payment. We may wish to contact you to discuss your application further.

How will the benefits section make a decision about Discretionary Payments?

We will consider all requests while trying to ensure that payments are made to those most in need. There is no list of circumstances that will automatically qualify you for an award. Each request will be considered on its own merits, but you will need to demonstrate that you do not have the means to pay the shortfall in your rent or Council Tax yourself and that you have not intentionally taken on a tenancy that you knew you could not afford. Wherever it is possible and reasonable to do so, you will be expected to take steps to improve the circumstances that have led to the need for a discretionary payment, for example - finding more affordable accommodation.

Can I claim Discretionary Payments to cover all my housing costs?

Discretionary Payments cannot be awarded for any of the following:

- * Ineligible service or support charges (water, fuel, meals etc)
- * Any rent you have to pay if you do not qualify for Housing Benefit
- * Increases in your rent to cover rent arrears
- * Reductions any benefit as a result of child support, non attendance at a work focused interview; employment sanctions or breach of community service orders
- * Shortfalls caused by Housing Benefit overpayment recovery
- * Shortfalls caused by recovery action taken due to non payment of Council Tax

How much money can I get?

Discretionary Payments will be paid at the discretion of the Council, but they cannot be greater than your weekly rent or Council Tax liability. For example if your eligible rent is £50.00 per week and your entitlement to Housing Benefit is £45.00, the maximum Discretionary Housing Payment you can get is £5.00 per week.

Discretionary Payments are strictly limited each year. If a payment is awarded, it will last for a specified period of time. Once the period ends you can apply for another Discretionary Payment award and this will be considered. Reported changes in circumstances can also reduce or end your award early, therefore the Local Authority must be advised of all changes as they occur.

If you are awarded a Discretionary Payment and we later find out you should not have been entitled to it, we will ask you to repay the money.

What if you turn my request down?

If your application for a Discretionary Payment is turned down and there is something you feel we have not considered or were not aware of; we will look at our decision again if you write to us within one month of the date that we inform you that your claim has been refused.

I want to apply

If you wish to proceed with an application for Discretionary Payments, please complete all sections of this application form indicating whether you wish to apply for extra help with Housing costs and/or Council Tax Reduction and submit it online to the Councils' Revenues and Benefits Service.

Changes you must tell us about straight away

You must tell the Councils' Revenues and Benefits Service immediately of any changes in circumstances affecting you, your partner or anyone else living in your home. For example:

- any of your children leave school or leave home
- anyone moves into or out of your home, including lodgers, sub-tenants and joint tenants
- your income or the income of anyone living with you, including benefits, changes
- your capital or savings change
- you or anyone living with you becomes a student, goes on a Youth Training Scheme, goes into hospital or a nursing home, goes into prison, or changes or leaves employment
- your rent changes
- you move
- you or your partner are going to be temporarily absent from your home
- you or anyone living with you starts work
- you receive any decision from the Home Office, **or**
- anything you have told us about changes
- You have a new baby

If you do not tell us about any changes, you may lose money you are entitled to or you may get too much money

You must make sure that **you** tell us about any changes. Do not rely on someone else to pass the message on.

South Somerset District Council

Please indicate whether you are asking for discretionary help towards:

Your Rent

Your Council Tax

Both

About you

Title

Surname or family name

Other names

Benefit Claim Number / Ref

Address, including room number if you have one

Postcode

Telephone

Mobile

Email address

Have you been told that your Housing Benefit award has been, or will be reduced for any of the following reasons:

- Your landlord is the council or a housing association and you have been told that you are over-accommodated (this is often referred to as a bedroom tax)
- You have been affected by the changes to the Local Housing Allowance provisions (If you are unsure the Housing Benefit service will be able to give you more information.)
- You have been told that your Housing Benefit will be reduced because the total amount of state benefits you are receiving is too high. (This is known as the overall benefit cap).
- None of the above apply to me.

About your circumstances

1 What enquiries did you make prior to occupying this address as to the level of Housing Benefit that may be awarded?

2 When did you move to this address?

3 Could you afford the rent when you first moved in? No
Yes

4 Have you tried to negotiate a lower rent with your landlord? If **Yes**, what was the outcome? If **No**, why not? No
Yes

5 How long would you need this extra help for?

6 When do you need the extra help from?

7 Do you have any rent arrears?

No

Yes How much?

8 What period do the rent arrears cover?

From To

9 What action has your landlord taken to recover your rent? Please send us proof of any action.

Court action Notice to quit

Notice seeking possession A payment plan

A letter Other

If **other**, please specify:

10 Please tell us how your accommodation is suitable for you and your family.

11 Please tell us how the area is suitable for you and your family.

12 Do you or a member of your family have mobility problems which mean you need easy access to public transport or shops, etc? If **yes**, please provide details:

No

Yes

13 Have you or a member of your family any health problems or disabilities? If **yes** - please give details.

No

Yes

Also enclose any supporting evidence when you return this form (Doctors letter, hospital or clinic appointments, medical certificates)

14 Has there been a death in your household in the past 12 months? If **yes** - please give details.

No

Yes

15 Have you considered / tried moving to cheaper accommodation? If **yes** - what action have you taken? If **no**, why not?

No

Yes

16 Please tell us about any recent or future changes affecting you or any member of your family that we should take into account?

- 17 Any additional information? e.g. any other special circumstances or unusual spending that makes it harder for you to pay your rent

- 18 The following people are expected to share a bedroom when entitlement to Housing Benefit is calculated:

- A couple
- 2 children aged less than 10, regardless of sex
- 2 children aged 10 or over of the same sex

Is there anyone who you believe must have a bedroom of their own because of their illness or disability?

No

Yes

If **yes**, we will contact you for further details.

Use our calculator to convert amounts to weekly and monthly values for household income:

Your	Amount	and	Frequency	equals	Weekly amount	Monthly amount
	<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>

Do you have a partner who lives with you? No
 Yes

Household Income

	You		Your Partner	
	Weekly	Monthly	Weekly	Monthly
Wages / Salary - Gross	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Wages / Salary - Net	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Income Support or Jobseeker's Allowance	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Statutory Sick / Maternity Pay / Company Sick Pay	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Working Tax Credits	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Child Tax Credits	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Retirement pension	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Private / Occupational pension	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Pension Credit	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Incapacity Benefit	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Employment Support Allowance	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
DLA Care	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
DLA Mobility	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Is this used towards the cost of a car?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> No
PIP Daily Living	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
PIP Mobility	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
AFIP	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Attendance Allowance	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Maintenance <i>(For yourself or your children)</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Housekeeping / money from people living with you	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other income / benefits	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Child Benefit	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Total	£	.00	.00
--------------	---	-----	-----

Use our calculator to convert amounts to weekly and monthly values for household expenditure:

Your	Amount	and	Frequency	equals	Weekly amount	Monthly amount
	<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="text"/>

Expenditure

	Weekly	Monthly		Weekly	Monthly
Rent you pay (the amount liable to pay)	<input type="text"/>	<input type="text"/>	Childminding fees	<input type="text"/>	<input type="text"/>
Mortgage you pay	<input type="text"/>	<input type="text"/>	Child clubs / pocket money	<input type="text"/>	<input type="text"/>
Council Tax you pay	<input type="text"/>	<input type="text"/>	Sky / Cable / Digital TV	<input type="text"/>	<input type="text"/>
Household shopping	<input type="text"/>	<input type="text"/>	Internet access	<input type="text"/>	<input type="text"/>
Payments to catalogues	<input type="text"/>	<input type="text"/>	Loan repayments	<input type="text"/>	<input type="text"/>
Phone (land line)	<input type="text"/>	<input type="text"/>	Credit card payments	<input type="text"/>	<input type="text"/>
Phone (mobile)	<input type="text"/>	<input type="text"/>	HP payments	<input type="text"/>	<input type="text"/>
Personal Insurance	<input type="text"/>	<input type="text"/>	Pension contributions	<input type="text"/>	<input type="text"/>
Home insurance	<input type="text"/>	<input type="text"/>	Regular savings	<input type="text"/>	<input type="text"/>
Health / Medical	<input type="text"/>	<input type="text"/>	Subscriptions	<input type="text"/>	<input type="text"/>
Water rates	<input type="text"/>	<input type="text"/>	Please Specify	<input type="text"/>	
Gas	<input type="text"/>	<input type="text"/>			
Electricity	<input type="text"/>	<input type="text"/>	Cigarettes / tobacco	<input type="text"/>	<input type="text"/>
Other household fuel	<input type="text"/>	<input type="text"/>	Alcohol	<input type="text"/>	<input type="text"/>
TV Licence	<input type="text"/>	<input type="text"/>	Entertainment / Eating out	<input type="text"/>	<input type="text"/>
Fines	<input type="text"/>	<input type="text"/>	Social Fund repayments	<input type="text"/>	<input type="text"/>
Maintenance / Child Support	<input type="text"/>	<input type="text"/>	Other	<input type="text"/>	<input type="text"/>
Shopping club	<input type="text"/>	<input type="text"/>	(Please detail these on Page 11)		
TV / Video hire	<input type="text"/>	<input type="text"/>	Total	£	.00
Newspapers / magazines	<input type="text"/>	<input type="text"/>			.00
Car - Petrol	<input type="text"/>	<input type="text"/>			
Car - Insurance	<input type="text"/>	<input type="text"/>			
Car - Tax	<input type="text"/>	<input type="text"/>			
Car - Maintenance	<input type="text"/>	<input type="text"/>			
Travel expenses	<input type="text"/>	<input type="text"/>			
Clothing / School Uniform	<input type="text"/>	<input type="text"/>			
School dinners	<input type="text"/>	<input type="text"/>			
Other school expenses	<input type="text"/>	<input type="text"/>			

Use our calculator to convert amounts to weekly and monthly values:

Your

Amount

 and

Frequency

 equals

Weekly amount

Monthly amount

How much you pay towards this

Priority debts / in arrears

	Amount	Weekly	Monthly
Mortgage Arrears	<input type="text"/>	<input type="text"/>	<input type="text"/>
Rent arrears	<input type="text"/>	<input type="text"/>	<input type="text"/>
Council Tax arrears	<input type="text"/>	<input type="text"/>	<input type="text"/>
Water Rate arrears	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gas / Electricity arrears	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other fuel arrears	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fines	<input type="text"/>	<input type="text"/>	<input type="text"/>
Maintenance arrears	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total	£	£.00	£.00

Other Debts

Creditor Name	Owed	Weekly	Monthly
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total	£	£.00	£.00

Debt Repayment

Do any of your declared expenses include debt repayment? No
 Yes

If **Yes**, what steps have you taken to reduce the level of the repayments?

Capital

Do you or your partner have any Bank or Building Society accounts?

No

Yes How many accounts?

	Amount	Whose?	Account Name and number
1	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>

Do you or your partner have any assets & investments - shares / bonds etc?

No

Yes How many accounts?

	Amount	Whose?	Account Name and number
1	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>

Do you or your partner have any property or land?

No

Yes Provide the approximate value of the property / land:

Address of the property / land

Postcode - UK only

Please use the box below to tell us any further information regarding income, capital or expenditure.

For example:

- If you have taken steps relating to the management of your debts please explain your action - contacted CAB etc
- If you have more than 5 bank / building society accounts.

Empty box for providing further information regarding income, capital or expenditure.

Name of applicant

Name of second applicant

Address for which claim is being made

Postcode

Type of occupancy

Our Submission Reference:

Even if someone else has filled in this form for you, as the claimant you must check and complete each of the declaration boxes. You must also enter the date you completed the declarations.

I declare the information I have given on this form is correct and complete. I have checked the information myself or have had it read back to me.

I understand that

- If I give information that is incorrect or incomplete, it is a criminal offence and you may take action against me.
- You will use the information I have provided to process my claim for Discretionary Housing Benefit or Council Tax Reduction Payment, or both. You may check some of the information with other sources within the Council, rent offices and other councils.
- You may use any information I have provided in connection with this and any other claim for Social Security benefits that I have made or may make. You may give some information to other government organisations, if the law allows this.
- Housing Benefit and Council Tax Reduction data may be supplied, through the Department for Work and Pensions, to Experian, a Credit Reference Agency, to prevent and detect benefit fraud. This could possibly include checks on undeclared cohabiters.

I authorise the council to make any necessary enquiries to verify the information on this form.

I know I must let the council know promptly about any changes in the circumstances I have given which might affect my claim and, that if I fail to let the council know about any change in the circumstances I have given I understand that I may be prosecuted and/or lose benefit for up to 13 weeks

I note that when I tell you of a change in circumstances resulting in an increase in my Housing Benefit or Council Tax Reduction entitlement, it will normally be effective from the Monday following the date I report the change to you. Delays in reporting these changes could result in me losing out on some benefit I could be entitled to. A change resulting in a reduction in my Housing Benefit or Council Tax Reduction entitlement is effective from the Monday following the date the change occurred. If I delay in reporting these changes, it could mean my benefits are overpaid to me and in most cases I will be responsible to repay these overpayments.

I give the council permission to share information about the progress of my claim with my landlord or their representative.

Date declarations completed:

If this form has been filled in by someone other than the person claiming, please tell us why you are filling in this form for the person claiming.

I declare that as far as possible, I have confirmed with the claimant that the answers I have written on this form are correct.

Name of the person who filled in the form

Confirmation **Date**

Relationship to the person claiming

Telephone number
If possible (this helps us if we have a query)

You are now at the end of the form please go back through the form and check your answers - click on the Show Errors button to highlight any omissions or mistakes.

Once the form has been checked and is free of errors please make sure that before submitting you understand the declaration page and have provided us with any further details you think we should know about on the extra page (page 11).

Once you are happy that you have filled in and completed the form you should then click the submit button on the left hand column.

Agenda Item 10

Quarterly Corporate Performance and Complaints Monitoring Report – 3rd Quarter 2016/17

Executive Portfolio Holder: Ric Pallister, Strategy and Policy
Principal Director: Rina Singh, Strategy
Director: Martin Woods, Service Delivery
Service Manager: Andrew Gillespie/Charlotte Jones, Performance Managers
Lead Officer: Anna-Maria Lenz, Performance Officer
Contact Details: anna-maria.lenz@southsomerset.gov.uk or (01935) 462216

Purpose of the Report

1. The report covers the period from 1st October – 31st December 2016 (Q3)

Forward Plan

2. This report appeared on the District Executive Forward Plan with an expected date of 2 March 2017.

Public Interest

3. The Council is accountable for its performance to the local community and we publish performance data to enable us to demonstrate achievements against targets.

Recommendations

4. The District Executive is asked to note and comment on the report.

Corporate Performance Monitoring - Background

5. This report still uses the established framework based on the 20 performance indicators selected and approved by members in 2012. As such, they provide either an indication of the efficiency and effectiveness of SSDC services and/or of any changes in the key trends in South Somerset.

Performance

6. A summary of performance from 1st October – 31st December 2016 (Q3) is shown below with more details provided at Appendix A:
7. Where appropriate, this information is colour coded, using red, amber, or green to indicate performance against target

Performance Summary:		Quarterly Breakdown:							
		Q1	Q2	Q3	Q4				
		1	10%	0	0%	2	20%	0	0%
		1	10%	1	10%	0	0%	0	0%
8	80%	9	90%	9	80%	0	0%		
		Commentary:							
		11 performance indicators can be compared against target for Q3. Percentages are rounded to the nearest whole number.							
>10% Below Target	2								
Within 10% of Target	0								
On or Above Target	9								

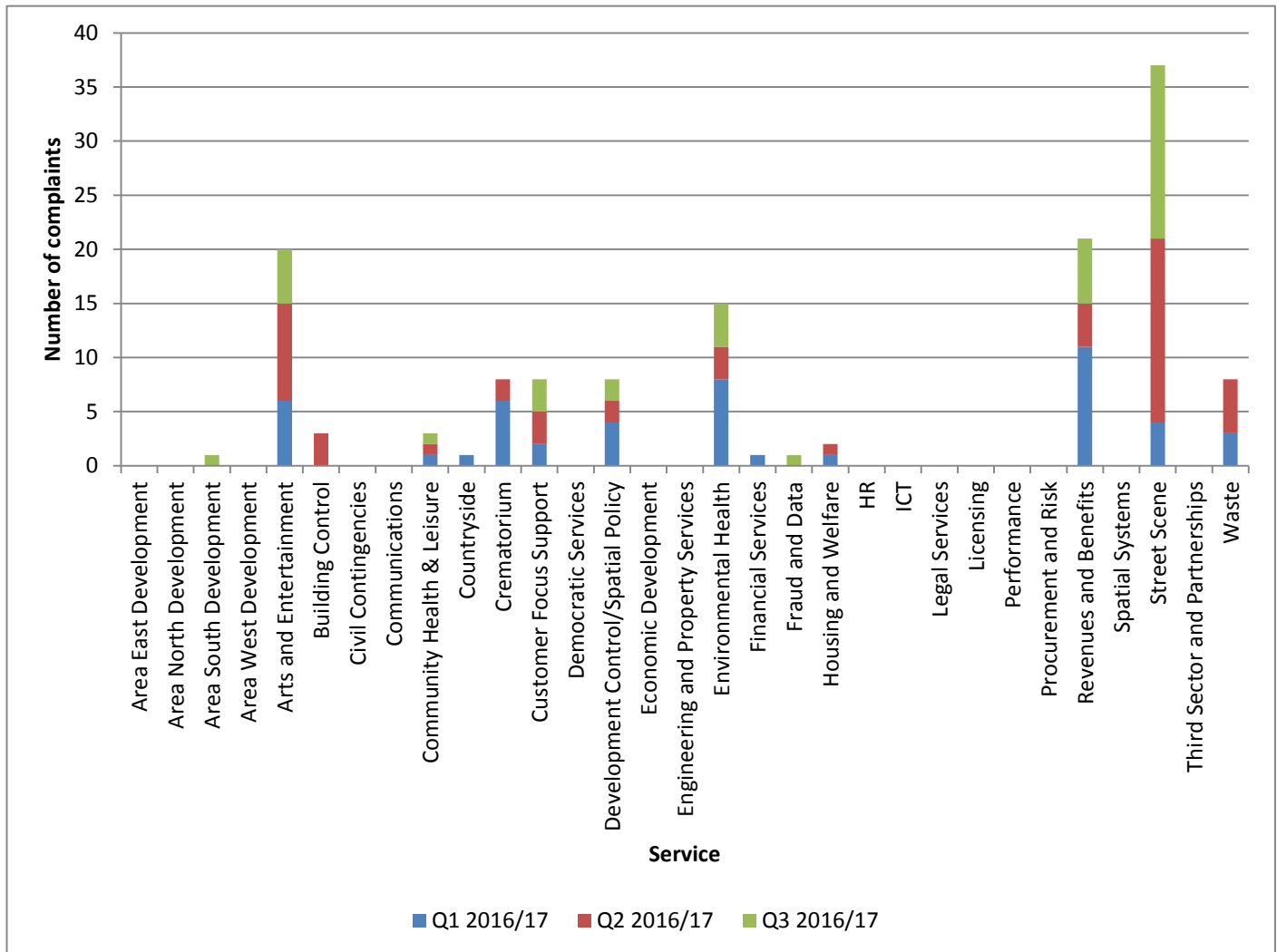
Performance Exceptions:

8. Indicators with performance below target are classed as exceptions. In these cases Appendix A includes an explanation from the Service Manager and any corrective action being taken. Two performance indicators were below target in Q3.

Measure	Target	Q1 Status
PI011 - Total estimated cost of clearing reported fly tips	13,965	Ⓡ
PI032 - Working days lost due to sickness absence per Full Time Employee (FTE)	6.00	Ⓡ

Complaints

9. During the period 1st October – 31st December 2016, SSDC received 39 complaints, which is a decrease of 9 when compared to the quarter 3 2015/16 outturn of 48.
10. The chart below provides a summary of complaints received in 2016/17. A detailed breakdown reflecting variations in trends by Service Area is in Appendix B.

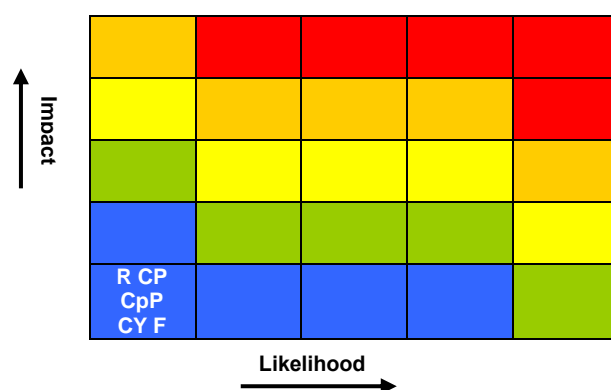


Financial Implications

- There are no direct financial implications related to this report. However, financial implications may need to be considered for possible actions necessary to address performance in failing areas.

Risk Matrix

- This matrix only identifies the risk associated with taking the decision as set out in the report as the recommendation(s). Should there be any proposal to amend the recommendation(s) by either members or officers at the meeting then the impact on the matrix and the risks it identifies must be considered prior to the vote on the recommendation(s) taking place.



Key

Categories	Colours (for further detail please refer to Risk management strategy)
R = Reputation	Red = High impact and high probability
CpP = Corporate Plan Priorities	Orange = Major impact and major probability
CP = Community Priorities	Yellow = Moderate impact and moderate probability
CY = Capacity	Green = Minor impact and minor probability
F = Financial	Blue = Insignificant impact and insignificant probability

Council Plan Implications

- Corporate Performance Management contributes towards the delivery of the SSDC Council Plan through effective monitoring and smart target setting that help to deliver a continuous improvement.

Carbon Emissions and Climate Change Implications

- None

Equality and Diversity Implications

- None

Privacy Impact Assessment

- No issues.

Background Papers

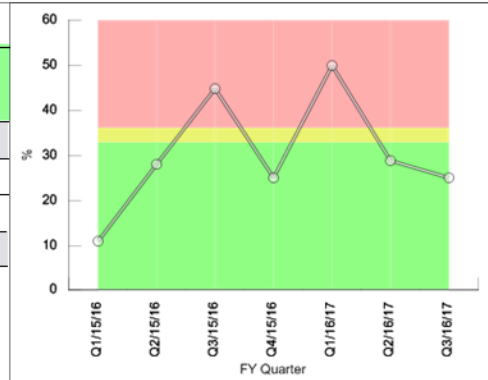
- Council Plan 2016-2021 (<http://www.southsomerset.gov.uk/about-us/council-plan-2016---2021/>)
- SSDC Corporate Indicators – District Executive May 2012

Appendix A - Quarterly Performance Monitoring Report

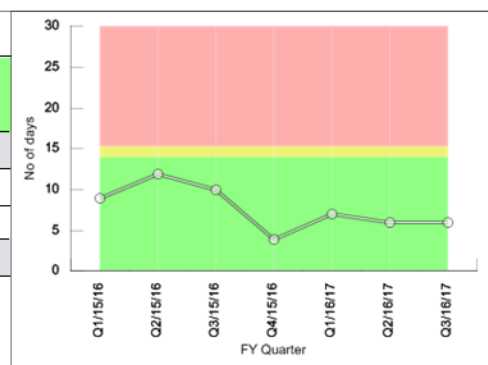
Key:	Red (More than 10% below target)	Amber (Within 10% of target)	Green (On or above target)
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Performance Measures with Targets:

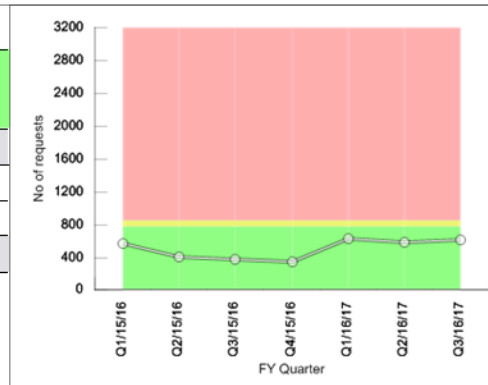
Indicator:	PI 003 - % of planning appeal decisions allowed against the authority's decision to refuse								
Quarter Target:	33.0%				Perf to Date:				
Annual Target:	33.0%								
2015/16:				2016/17:					
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
11.0% G	28.0% G	45.0% R	25.0% G	50.0% R	29.0% G	25.0% G			
Latest Comments including any necessary action:									



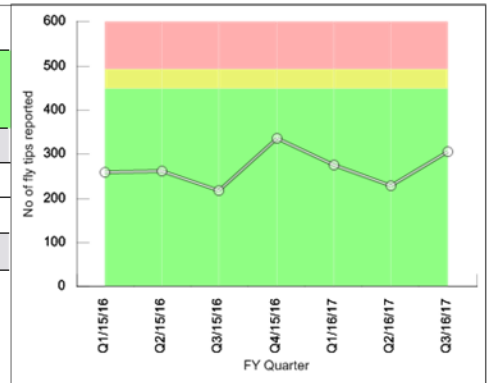
Indicator:	PI 004 - Number of days taken to process Housing Benefit/ Council Tax Benefit new claims and change events								
Quarter Target:	14.00				Perf to Date:				
Annual Target:	14.00								
2015/16:				2016/17:					
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
9.00 G	12.00 G	10.00 G	4.00 G	7.00 G	6.00 G	6.00 G			
Latest Comments including any necessary action:									



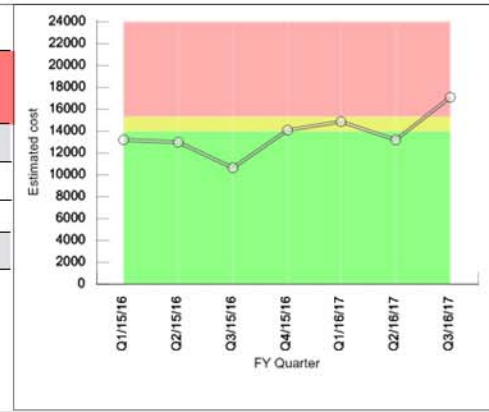
Indicator:	PI 008 - Requests for action from the Streetscene team								
Quarter Target:	775				Perf to Date:				
Annual Target:	3100								
2015/16:				2016/17:					
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
568 G	415 G	383 G	355 G	628 G	590 G	618 G			
Latest Comments including any necessary action:									



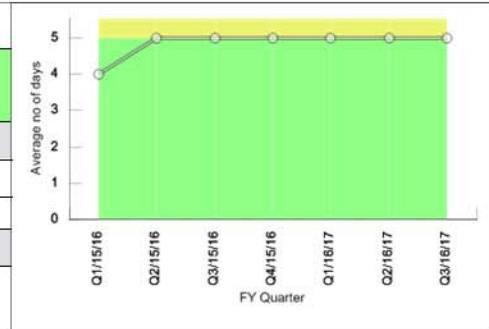
Indicator:	PI 010 - Total number of fly tips reported								
Quarter Target:					Perf to Date:				
Annual Target:	1800								
2015/16:				2016/17:					
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
259 G	263 G	220 G	337 G	277 G	231 G	306 G			
Latest Comments including any necessary action:									



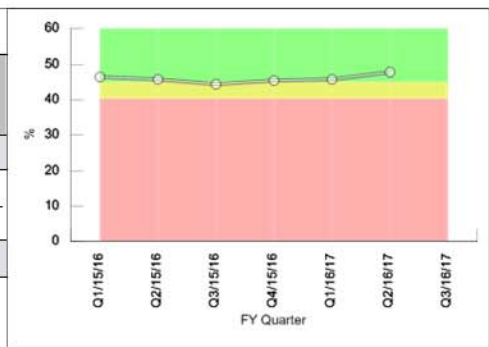
Indicator:	PI 011 - Total estimated cost of clearing reported fly tips						
Quarter Target:	13,965			Perf to Date:			
Annual Target:	55,860						
2015/16:				2016/17:			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
13,263 G	12,982 G	10,677 G	14,123 A	14,841 A	13,207 G	17,042 R	
Latest Comments including any necessary action:							
There has been an increase in the number of fly tips which has led to an increase in the total cost of clearing them.							



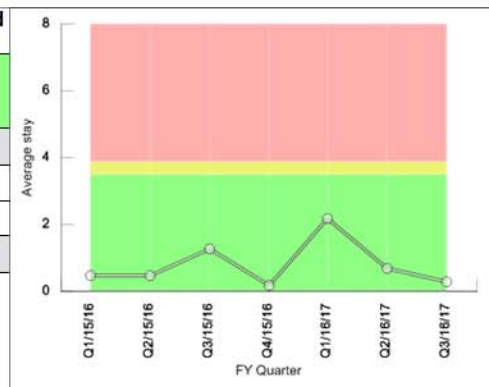
Indicator:	PI 012 - Average number of days to respond to a reported fly tip						
Quarter Target:	5.00			Perf to Date:			
Annual Target:							
2015/16:				2016/17:			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
4.0 G	5.0 G	5.0 G	5.0 G	5.0 G	5.0 G	5.0 G	
Latest Comments including any necessary action:							



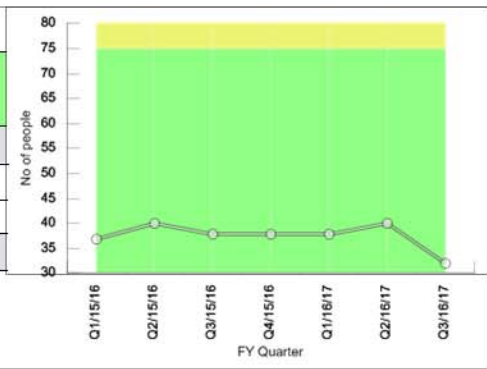
Indicator:	PI 013 - % of household waste sent for reuse, recycling and composting						
Quarter Target:	45.0%			Perf to Date:			
Annual Target:	45.0%						
2015/16:				2016/17:			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
46.5% G	46.0% G	44.4% A	45.5% G	45.8% G	47.9% G		
Latest Comments including any necessary action:							
The latest performance data is available here: http://www1.somerset.gov.uk/council/meetings/results.asp?cocode=32							



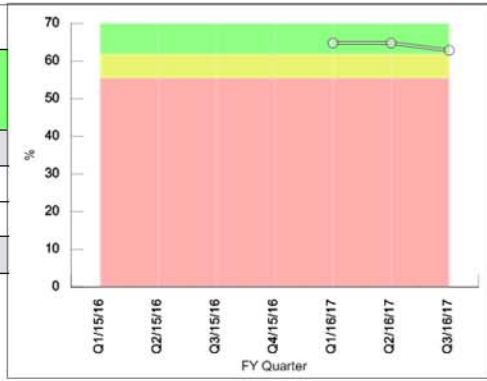
Indicator:	PI 019 - Average number of days in Temporary Accommodation (Bed & Breakfast)						
Quarter Target:				Perf to Date:			
Annual Target:	4.5						
2015/16:				2016/17:			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
0.5 G	0.5 G	1.3 G	0.2 G	2.2 G	0.7 G	0.3 G	
Latest Comments including any necessary action:							
One household was placed in, and left, bed and breakfast during this quarter. The stay was for 2 nights (hence 0.3 weeks) during severe weather.							



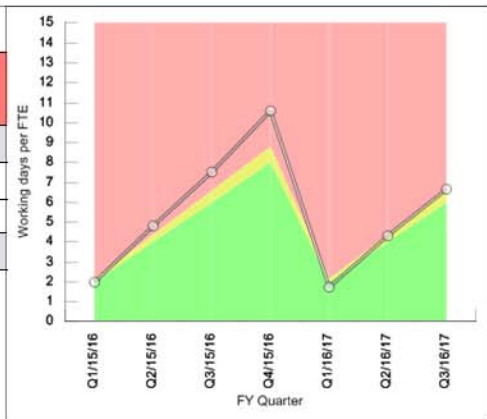
Indicator:	PI 020 - Total number of people in Temporary Accommodation (all types)							
Quarter Target:	75				Perf to Date:			
Annual Target:	75							
2015/16:				2016/17:				
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
37 G	40 G	38 G	38 G	38 G	40 G	32 G		
Latest Comments including any necessary action:								



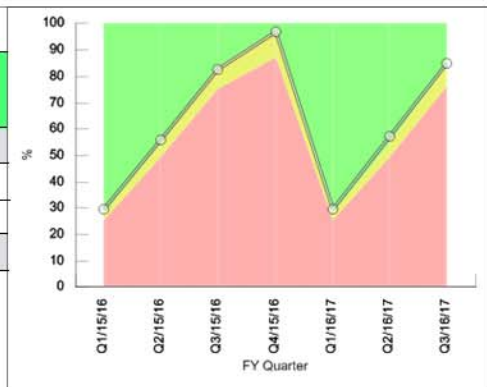
Indicator:	PI 031 - % of calls to contact centre resolved in the contact centre							
Quarter Target:	62.0%				Perf to Date:			
Annual Target:	62.0%							
2015/16:				2016/17:				
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
N/A	N/A	N/A	N/A	65.0% G	65.0% G	63.0% G		
Latest Comments including any necessary action:								



Indicator:	PI 032 - Working days lost due to sickness absence per Full Time Employee (FTE)							
Quarter Target:	6.00				Perf to Date:			
Annual Target:	8.00							
2015/16:				2016/17:				
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
2.01 A	4.80 P	7.51 P	10.59 P	1.77 G	4.32 A	6.69 P		
Latest Comments including any necessary action:								
Long term sickness account for 64% of the total. Phased returns account for 2.5% of the total.								

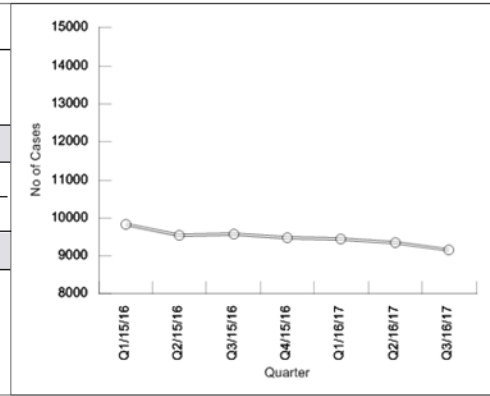


Indicator:	PI 035 - Percentage of Council Tax Collected							
Quarter Target:	84.5%				Perf to Date:			
Annual Target:	97%							
2015/16:				2016/17:				
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
29.6% G	55.9% G	82.8% A	97.2% A	29.8% G	57.2% G	84.8% G		
Latest Comments including any necessary action:								

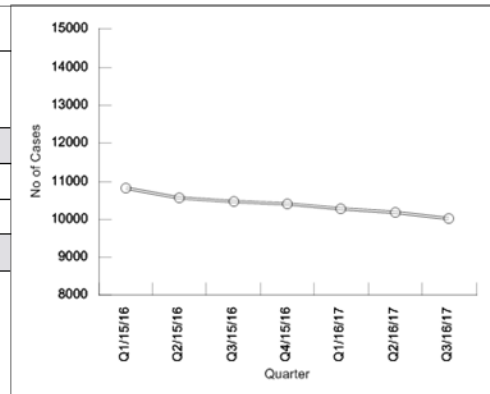


Performance Measures of Trend (no targets set as SSDC do not directly influence):

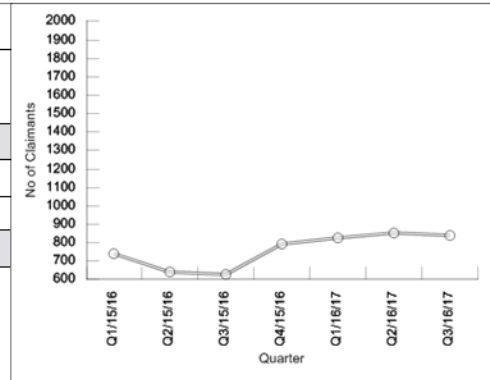
Indicator:	PI 001a - Number of Housing Benefit cases received							
Quarter Target:	N/A				Perf to Date:			
Annual Target:	N/A							
2015/16:				2016/17:				
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
9,827	9,565	9,590	9,490	9,439	9,371	9,170		
Latest Comments including any necessary action:								



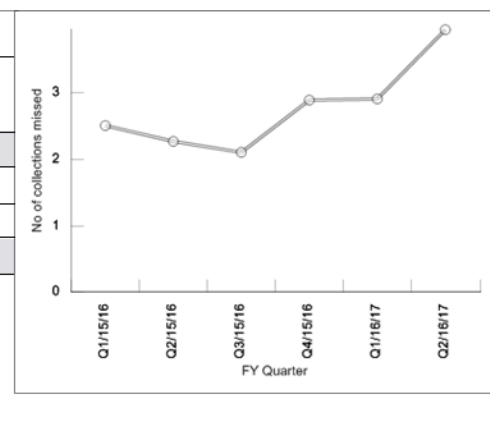
Indicator:	PI 001b - Number of Council Tax Reduction cases received							
Quarter Target:	N/A				Perf to Date:			
Annual Target:	N/A				10027			
2015/16:				2016/17:				
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
10,826	10,580	10,463	10,411	10,272	10,196	10,027		
Latest Comments including any necessary action:								



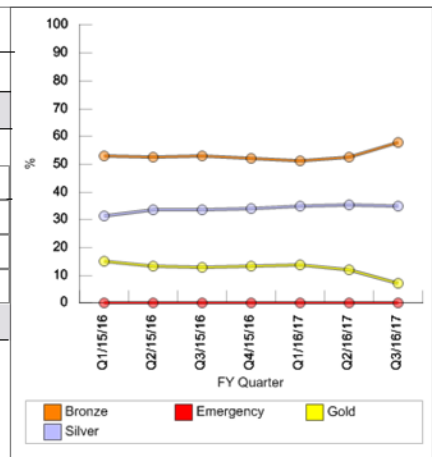
Indicator:	PI 002 - Total number of JSA claimants in South Somerset							
Quarter Target:	N/A				Perf to Date:			
Annual Target:	N/A							
2015/16:				2016/17:				
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
740	640	630	796	830	853	840		
Latest Comments including any necessary action:								



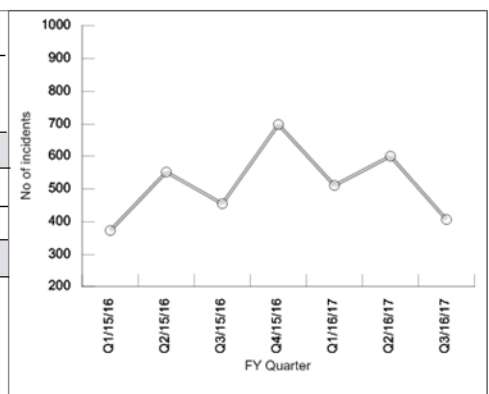
Indicator:	PI 009 - Number of bin collections missed per 1000 households (all types - dry recycling and kitchen waste, refuse and garden)							
Quarter Target:	N/A				Perf to Date:			
Annual Target:	N/A							
2015/16:				2016/17:				
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
2.51	2.27	2.11	2.90	2.91	3.94			
Latest Comments including any necessary action:								
<p>The rise in the number of missed bins is due to a number of factors, but mainly associated with a period of driver shortage. A new supervisor has now been appointed in our area, and the situation has stabilised, so these figures should show a steady improvement over the next two quarters.</p> <p>The latest performance data is available here: http://www1.somerset.gov.uk/council/meetings/results.asp?ccode=32</p>								



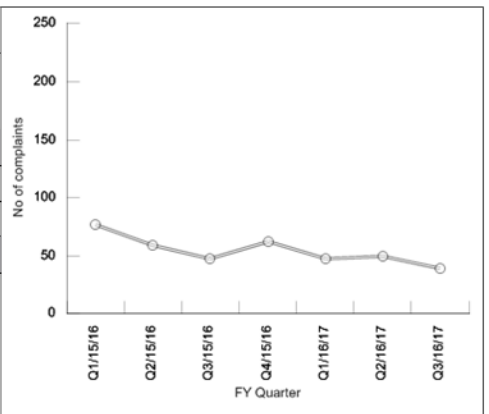
Indicator:	PI 015 - % of households on the Choice Based Letting waiting list (all categories)							
Quarter Target:	N/A				Annual Target:	N/A		
	2015/16:				2016/17:			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Bronze	53.3%	52.7%	53.2%	52.4%	51.2%	52.6%	58.0%	
Silver	31.5%	33.5%	33.7%	34.3%	34.9%	35.3%	34.9%	
Gold	15.1%	13.6%	13.0%	13.4%	13.8%	11.9%	7.1%	
Emergency	0.1%	0.2%	0.2%	0.0%	0.1%	0.2%	0.0%	
Latest Comments including any necessary action:								
Q2 2016-17				Q3 2016-17				
Bronze	1,016			Bronze	1,114			
Emergency	3			Emergency	0			
Gold	230			Gold	137			
Silver	681			Silver	671			
Total	1,930			Total	1,922			



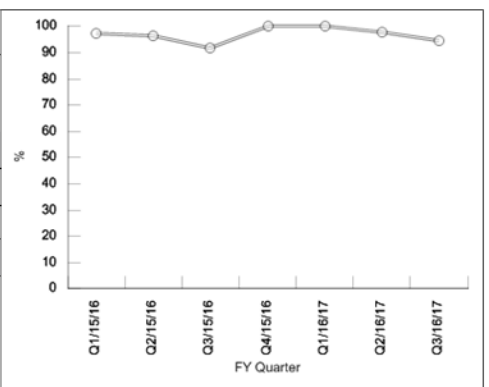
Indicator:	PI029 - Number of incidents of antisocial behaviour reported to SSDC (excluding flytipping and dead animals)							
Quarter Target:	N/A				Perf to Date:			
Annual Target:	N/A							
	2015/16:				2016/17:			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
	373	554	455	698	513	600	409	
Latest Comments including any necessary action:								
Decrease on last quarter but comparative figure to Q3 last year. Decrease not unexpected in this period due to seasonal change								



Indicator:	PI 033 - Total number of complaints received							
Quarter Target:	N/A				Perf to Date:			
Annual Target:	N/A							
	2015/16:				2016/17:			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
	77	59	48	63	48	50	39	
Latest Comments including any necessary action:								



Indicator:	PI 034 - % of complaints resolved at stage 1 of complaints procedure							
Quarter Target:	N/A				Perf to Date:			
Annual Target:	N/A							
	2015/16:				2016/17:			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
	97.4%	96.6%	91.7%	100.0%	100.0%	98.0%	94.9%	
Latest Comments including any necessary action:								
Stage 1: 37 Stage 2: 2 Stage 3: 0								



Agenda Item 11

District Executive Forward Plan

Executive Portfolio Holder: Ric Pallister, Leader, Strategy and Policy
Director: Ian Clarke, Director - Support Services
Lead Officer: Ian Clarke, Director – Support Services
Contact Details: ian.clarke@southsomerset.gov.uk or (01935) 462184

1. Purpose of the Report

1.1 This report informs Members of the current Executive Forward Plan, provides information on Portfolio Holder decisions and on consultation documents received by the Council that have been logged on the consultation database.

2. Public Interest

2.1 The District Executive Forward Plan lists the reports due to be discussed and decisions due to be made by the Committee within the next few months. The Consultation Database is a list of topics which the Council's view is currently being consulted upon by various outside organisations.

3. Recommendations

3.1 The District Executive is asked to:-

- I. approve the updated Executive Forward Plan for publication as attached at Appendix A;
- II. note the contents of the Consultation Database as shown at Appendix B.

4. Executive Forward Plan

4.1 The latest Forward Plan is attached at Appendix A. The timings given for reports to come forward are indicative only, and occasionally may be re scheduled and new items added as new circumstances arise.

5. Consultation Database

5.1 The Council has agreed a protocol for processing consultation documents received by the Council. This requires consultation documents received to be logged and the current consultation documents are attached at Appendix B.

6. Background Papers

6.1 None.

APPENDIX A - SSDC Executive Forward Plan

Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
April 2017	Proposed Redevelopment of Yeovil Crematorium (Confidential)	Portfolio Holder for Area South	Assistant Director (Environment)	Alasdair Bell, Environmental Health Manager	District Executive
April 2017	Community Right to Bid - 6 monthly update	Portfolio Holder for Strategic Planning (Place Making)	Assistant Directors (Communities)	David Crisfield, Third Sector & Partnerships Co-ordinator	District Executive
April 2017	Prevention Charter for Somerset (from the Director of Public Health, SCC)	Portfolio Holder Leisure & Culture	Assistant Director (Health and Well-Being)	Angela Cox, Democratic Services Manager	District Executive
April 2017	Intensification of use of Easement from 26 St James Street, South Petherton onto Prigg Lane Car Park (Confidential)	Portfolio Holder for Property & Climate Change	Assistant Director (Finance and Corporate Services)	Diane Layzell, Senior Land and Property Officer	District Executive
May 2017	Charging for Mobile Home Sites	Portfolio Holder for Strategy and Policy	Assistant Director (Environment)	Alasdair Bell, Environmental Health Manager	District Executive
May 2017	Update report on Intelligent Enforcement Proposal for Council car parks	Portfolio Holder for Property & Climate Change	Assistant Director (Environment)	Garry Green, Engineering & Property Services Manager	District Executive

Date of Decision	Decision	Portfolio	Service Director	Contact	Committee(s)
May 2017	Capital & Revenue Budget monitoring reports for quarter 4 - Outturn Reports	Portfolio Holder for Finance and Legal Services	Assistant Director (Finance and Corporate Services)	Donna Parham, Assistant Director (Finance & Corporate Services)	District Executive
June 2017	Quarterly Performance and Complaints Monitoring Report	Portfolio Holder for Strategy and Policy	Deputy Chief Executive	Anna-Maria Lenz, Performance Officer	District Executive
July 2017	Adoption of the new Commercial Land and Property Strategy	Portfolio Holder for Property & Climate Change	Chief Executive	Clare Pestell, Director (Commercial Services & Income Generation)	District Executive
September 2017	CIL Governance - Policy to decide how funds are allocated	Portfolio Holder for Strategic Planning (Place Making)	Director Service Delivery	Martin Woods, Director (Service Delivery)	District Executive
September 2017	Capital & Revenue Budget monitoring reports for Quarter 1	Portfolio Holder for Finance and Legal Services	Assistant Director (Finance and Corporate Services)	Donna Parham, Assistant Director (Finance & Corporate Services)	District Executive
September 2017	Quarterly Performance and Complaints Monitoring Report	Portfolio Holder for Strategy and Policy	Rina Singh	Anna-Maria Lenz, Performance Officer	District Executive

APPENDIX B - Current Consultations – March 2017

Purpose of Document	Portfolio	Director	Response to be agreed by	Contact	Deadline for response
<p>Amendment to the Tenant Involvement and Empowerment Standard – consultation from the HCA</p> <p>This consultation document introduces the changes proposed by the regulator to its Tenant Involvement and Empowerment Standard. This change is to clarify and strengthen rather than to extend the regulator’s requirements in regard to consulting with tenants on change of landlord.</p> <p>https://www.gov.uk/government/consultations/amendment-to-the-tenant-involvement-and-empowerment-standard</p>	Strategy and Policy	Director (Service Delivery)	Officers in consultation with Portfolio Holders	Colin McDonald	22 nd March 2017
<p>Building our Industrial Strategy</p> <p>We want to build an industrial strategy that addresses long-term challenges to the UK economy. Our aim is to improve living standards and economic growth by increasing productivity and driving growth across the whole country. This green paper sets out our approach and some early actions we have committed to take. It is not intended to be the last word, but instead to start a consultation</p> <p>https://www.gov.uk/government/consultations/building-our-industrial-strategy</p>	Property & Climate Change / Environment & Economic Development	Assistant Director (Environment) / Director (Service Delivery)	Officers in consultation with Portfolio Holders	Keith Wheaton-Green / David Julian	17 th April 2017
<p>Planning and affordable housing for Build to Rent</p> <p>Consultation on changes to planning policy to encourage authorities to plan for Build to Rent schemes, with Affordable</p>	Strategy and Policy	Director (Service Delivery)	Officers in consultation with Portfolio	Colin McDonald	1 st May 2017

Purpose of Document	Portfolio	Director	Response to be agreed by	Contact	Deadline for response
<p>Private Rent to substitute for other types of affordable housing.</p> <p>https://www.gov.uk/government/consultations/planning-and-affordable-housing-for-build-to-rent</p>			Holders		
<p>Fixing our broken housing market: consultation</p> <p>Consultation on changes to planning policy and legislation in relation to planning for housing, sustainable development and the environment.</p> <p>https://www.gov.uk/government/consultations/fixing-our-broken-housing-market-consultation</p>	Strategy and Policy	Director (Service Delivery)	Officers in consultation with Portfolio Holders	Colin McDonald	2 nd May 2017
<p>Public Consultation – A303 Sparkford to Ilchester Dualling</p> <p>This section of the A303 between Sparkford and Ilchester comprises a mix of dual and single lane carriageway, which leads to localised congestion, impacting adversely on journey times and reliability. This section also has a poor accident record as a result of poor junction alignment and visibility, and changes in road type.</p> <p>Highways England are proposing to dual this single carriageway section. The scheme will reduce congestion, improve journey times and make our network safer for customers.</p> <p>Two route options have been shortlisted and views are welcomed before a decision on the preferred route is made.</p> <p>www.highways.gov.uk/Sparkford-to-Ilchester</p>	Public Consultation				29 th March 2017

Agenda Item 12

Date of Next Meeting

Members are asked to note that the next scheduled meeting of the District Executive will take place on **Thursday, 6th April 2017** in the Council Chamber, Council Offices, Brympton Way, Yeovil commencing at 9.30 a.m.