

NOTICE OF MEETING

Meeting: CORPORATE OVERVIEW AND SCRUTINY PANEL

Date and Time: THURSDAY, 27 SEPTEMBER 2018, AT 9.30 AM*

Place: COMMITTEE ROOM 1, APPLETREE COURT,
LYNDHURST

Telephone enquiries to: Lyndhurst (023) 8028 5000
023 8028 5588 - ask for Andy Rogers
Email: andy.rogers@nfdc.gov.uk

PUBLIC PARTICIPATION:

*Members of the public may speak in accordance with the Council's public participation scheme:

- (a) immediately before the meeting starts, on items within the Panel's terms of reference which are not on the public agenda; and/or
 - (b) on individual items on the public agenda, when the Chairman calls that item.
- Speeches may not exceed three minutes. Anyone wishing to speak should contact the name and number shown above.

Bob Jackson
Chief Executive

Appletree Court, Lyndhurst, Hampshire. SO43 7PA
www.newforest.gov.uk

This Agenda is also available on audio tape, in Braille, large print and digital format

AGENDA

Apologies

1. MINUTES

To confirm the minutes of the meeting held on 21 June 2018 as a correct record.

2. DECLARATIONS OF INTEREST

To note any declarations of interest made by members in connection with an agenda item. The nature of the interest must also be specified.

Members are asked to discuss any possible interests with Democratic Services prior to the meeting.

3. PUBLIC PARTICIPATION

To note any issues raised during the public participation period.

4. PORTFOLIO HOLDERS' UPDATES

To receive an oral update from the Portfolio Holders for:

- Leader & Corporate Affairs
- Finance, Corporate Services & Improvement
- Local Economic Development, Property & Innovation

- on developments within their Portfolio areas.

5. SMARTER WORKING - THE CASE FOR CHANGE (Pages 1 - 6)

To consider the strategic approach to Smarter Working, together with related implementation and budget plans for the period 2018/21.

6. COUNCIL TAX REDUCTION SCHEME TASK AND FINISH GROUP (Pages 7 - 14)

To receive the recommendations of the Council Tax Reduction Scheme Task and Finish Group on various aspects of the Scheme.

7. COUNCIL TAX DISCOUNTS AND EXEMPTIONS, VOLUNTARY PAYMENTS AND RELATED POLICIES (Pages 15 - 36)

To consider the recommendations of the Council Tax Reduction Scheme Task and Finish Group, concerning various Council Tax discounts and exemptions, voluntary payments, and related policies.

8. COMPLAINTS ANNUAL REPORT (Pages 37 - 56)

To receive an overview of complaints received by the Corporate Complaints Team in 2017/18, including statistical data from the Local Government Ombudsman.

9. FILM NEW FOREST - UPDATE (Pages 57 - 60)

To receive an update on activities.

10. WORK PROGRAMME (Pages 61 - 62)

- (a) To consider the Panel's future Work Programme, including any reviews of previous work undertaken; and
- (b) To receive any updates on Task and Finish Group work.

11. MEETING DATES FOR THE MUNICIPAL YEAR

27 June 2019
26 September 2019
23 January 2020
26 March 2020

(All Thursdays, at 9.30am).

12. DATE FOR SPECIAL PANEL MEETING

RECOMMENDATION:

That in order to receive the recommendations of the Budget Task and Finish Group and deal with other issues, it is proposed to hold a Special Meeting on the following date:

Thursday, 22 November 2018 at 9.30am in Committee Room 1, Appletree Court.

13. ANY OTHER ITEMS WHICH THE CHAIRMAN DECIDES ARE URGENT

To: **Councillors:**

M A Steele (Chairman)
A K Penson (Vice-Chairman)
A R Alvey
W G Andrews
G C Beck

Councillors:

M J Kendal
Mrs A E McEvoy
A D O'Sullivan
D B Tipp
C A Wise

This page is intentionally left blank

SMARTER WORKING – THE CASE FOR CHANGE

1. Purpose of Report

- 1.1 To set out the case for a Strategic Approach to “Smarter Working” and an implementation and budget plan for the period 2018 to 2021 to assist with delivery.

2. Background

- 2.1 It is said that people are the Council’s greatest asset and the dedication and commitment of staff helps make the Council what it is.

However, all too often Council staff are delivering high quality services against a background of outdated IT, poorly designed workplaces and inflexible working practices. The Council will only be able to realise its full potential if we empower staff with the right tools and create the right environment. More than anything, we have to free up the culture of work so people can just get on with it unhindered. This is why the way we work is so very important.

Working smarter will lead us to challenge all the assumptions of our traditional ways of working and bring a new approach to management and teamwork, with a sharp focus on management by outcomes. We need to develop skills and shared expectations about how work is done, and be innovative in developing more effective and efficient ways of working.

- 2.2 Transforming the way we work is not a “nice to have”. It is the only way to make sure we provide the services our customers expect and demand, both now and in the future.

3. Strategic Approach

- 3.1 In the current challenging climate we need to take steps not only to weather the current economic pressures, but also to plan for the longer term. Smarter Working is at the heart of transforming and streamlining the Council.

- 3.2 We are taking a strategic approach to modernising working practices across the Council. It is based upon the following principles:

- Work takes place at the most effective locations and at the most effective times, respecting the needs of the task, the customer, the individual and the team.
- Simplified collaboration and connectivity virtually everywhere, means sharing information and working with others, regardless of location.
- Space is allocated to activities, not individuals and not on the basis of seniority.
- A flexibility-first approach, where flexibility is the norm, rather than the exception.
- A shared and agreed approach to Smarter Working which balances the freedom to choose, with the responsibility to meet Council business needs.
- The processes people are asked to work with are continuously challenged to make sure they are fit for purpose.
- Managing performance focuses on results and outcomes, rather than presence.

3.3 The outcomes of adopting this Strategic approach:

- Greater productivity and services delivered more effectively.
- The costs and environmental impacts of work are reduced as space is shared and used more intensively.
- Staff have more choice about when where and how they work, supported and connected by effective and appropriate technology.
- Staff have the opportunity to lead more balanced and healthier lives.
- An end to wasteful working practices which are currently built into traditional ways of working, including:
 - ❖ Commuting (average UK worker commutes for an hour a day – equivalent to 4 years over a working life)
 - ❖ Office space (average UK office occupancy is 45%)

3.4 In summary, there are positive impacts from Smarter Working on the “Triple Bottom Line” - benefits for public service, for staff and for the environment.

3.5 We aim to ensure we will be a Council in which:

- Well-designed workplaces support how people work best, with location options such as shared hubs with other public bodies, hosted space, an HQ and home.
- Work is undertaken in a variety of settings, to ensure staff are no longer tethered to a desk.
- IT is usable, convenient and works just as well in and away from the office.
- Connectivity to colleagues and to data can be provided from virtually anywhere.
- Security and access arrangements make it easy and safe to work in a variety of settings.
- Management embrace and exploit the flexibility, productivity and effectiveness offered by the changes to our workplace.

3.6 Work in the future is about what you do, not where you do it. The strategic use of technology will enable much of the work we do to be carried out from other locations, as well as offices.

4. **Business Case**

4.1 It is vital that the move to Smarter Working has strong support from Members and Senior Management. Without strong messages coming down, individual managers may resist or introduce compromise that will in the end lead to failure of the project. So the vision and the broad direction of the changes need to be clearly understood by everyone at the outset and throughout implementation.

4.2 The business case for Smarter Working is relatively straightforward:

The Council will invest in:

- The working environment
- Technology and business processes
- Flexible working practices

The benefits are:

- Lower operating costs
- Higher productivity
- Improved staff performance
- Better service delivery

In addition, non-financial benefits can include improved environmental and social sustainability and better employee health and wellbeing.

4.3 In summary, investing in a combination of new working environments, technology, business processes can deliver substantial business benefits.

5. Implementing Change

5.1 Implementing the changes will involve close liaison between members, senior management, the facilities team, estates, IT and HR working with the management of service teams undergoing the change. This will likely involve rethinking the culture and management practices of the service. To help support this approach, the services of Portsdown Office Ltd have been procured to assist with interior designers/project managers/furniture suppliers. They are a local business that has done significant work for Hampshire County Council and previously assisted the Council.

5.2 The Council recognises that it is not in a position to do everything at once; there are constraints on the investment in IT, the availability and suitability of accommodation. There are also opportunities with the need to vacate Lymington Town Hall with demand from new tenants to occupy the space. The approach to change both recognises these constraints as well as taking the opportunities to progress Smarter Working.

5.3 Following on from this strategic approach detailed below is the Council's implementation plan for 2018-2020 which covers the themes of Culture, Technology and Workspace. The themes are running in parallel and cover the following key areas:

- Learning and support for staff and managers – this has involved both managers and employee sessions for some service areas with further sessions completed by March 2019. This gives staff a chance to discuss the changes and opportunities smarter working will offer, with action plans to support the teams through the change.
- We are working with Portsdown to deliver modern flexible workspaces in Appletree Court (Ground floor south wing) and will also focus on the much-needed drop in spaces across the District.
- On the technology theme, we are 60% through the roll out of Hybrid Devices (Laptops), with the first phase of Office365 implementation scheduled for March 2019.

Tasks	Q4, 18	Q1, 19	Q2, 19	Q3, 19	Q4, 19	Q1, 20	Q2, 20	Q3,20	Theme
Learning and support for Staff and Managers									Culture
Workspace changes									Workspace
New ICT infrastructure and Hybrid Device roll out									Technology
Office 365 - Phase 1 email, instant messenger									Technology
Office 365 - Phase 2 external telephony									Technology
Office 365 Phase 3 – replace Meridio with SharePoint									Technology

6. Budget Investment Plan

- 6.1 Investment in technology and accommodation is essential to meet the key themes of Smarter Working:

6.1.1 TECHNOLOGY

The aim of Smarter Working is to enable our staff to work from any location. In practical terms, the appropriate technologies for the future are 'hybrids' combining the best features of laptops with the touch-screen ease of use of tablets, rather than desktop computers. These are then combined with new ICT infrastructure, together with a new communications network, new ways of remotely connecting into it, and new in-office Wi-Fi. All of this will make flexible working a practical reality for staff. Choosing the right technologies for staff has been based on a rigorous assessment both of operational and user needs, as well as an awareness of the ever-increasing possibilities as technologies evolve.

Effective use of new technologies is central to Smarter Working. With the right technology choices, staff can work more effectively in the office and away from it, using internet, broadband and wireless communications to work at the most effective times and locations. The focus is on empowering employees wherever they work with productivity tools, collaboration tools and access to systems and data.

6.1.2 WORKSPACE

The aim is to create attractive and inspiring work environments across the Council that support the new work styles, increase the adaptability of space, and increase performance.

A smart and flexible approach to office design will seek to achieve these benefits while at the same time achieving significant savings and efficiency gains. Unlike, traditional offices, which are based on having ranks of personally allocated desks, Smart office environments will have a mix of work positions and meeting spaces where work can be carried out.

While one of the aims is to have offices utilised more efficiently and to save costs by eliminating wasted space, it is also the aim to use under-occupied space to provide alternative non-desk spaces that are closely aligned to the needs of modern, Smart employees.

Some interesting facts are that a traditional office is used only 30% of the time (Monday to Friday 8am to 6pm); typical desk occupancy is 45% and office costs per desk are around £5,000 per annum on average. There is an opportunity for significant financial savings.

7. Financial Implications

- 7.1 The transition towards Smarter Working and the need for investment in order to deliver was recognised by the Council with budget provision approved (Feb '18) within the Council's MTFP capital programme 2018/19 – 2020/21. The budget provision approved by Council over the 3 financial years was £3.5m. This was intended to cover in addition to any upfront Design and Feasibility work, ICT requirements and accommodation and related expenditure when opportunities to progress the Council's readiness for Smarter Working occurred.
- 7.2 When opportunities arose, Cabinet was given authority by Council to develop and authorise draw down on this budget as appropriate.
- 7.3 The development of the Council's ICT strategy recognises the important role it can play in ensuring the Council best utilises technology in the future design of services. The essential replacement of the existing Avaya telephone system and the existing Meridio electronic

document filing and retention solution creates the opportunity to develop solutions that support the development of Smarter Working. The introduction of Office 365, which provides Email, Calendar, Office tools as well as Skype for telephony and SharePoint for document management has been identified as the best way forward. Replacement of Meridio alone is estimated at £250,000 and Telephony has a similar cost. Full implementation of Office 365 is estimated to require investment of about £750,000 spread over the next 18 months, with an ongoing net annual cost of around £200,000 per annum.

- 7.4 The opportunity to move the Revenue & Benefits team from Lymington Town Hall to Appletree Court not only generates a net saving and income opportunity of approximately £140,000 per annum it provides the opportunity to redesign the ground floor of the South Wing, in addition to improvements to a limited number of other workspaces at Appletree Court, making them all Smarter Working Workspaces.
- 7.5 Work is ongoing with the Council's appointed design and building contractors on these initial areas of Appletree Court. In addition other and existing satellite sites, like Ringwood Gateway are being reviewed to determine whether investment could create more suitable Smarter Working workplaces.
- 7.6 In order to deliver the types of benefits set out in this report Cabinet is asked to approve the utilisation of budgets previously provided in the MTFP of £1.25 million to be utilised as follows:

	£'000
Office 365 Including Meridio	750
Accommodation Changes	500
	1,250

- 7.7 Identified annual financial benefits/additions that achieve a neutral budget position as required by the MTFP, are as follows:

Rental from Lymington Town Hall	(140)
ICT annual costs (Office 365)	200
Savings and productivity to be identified from Smarter Working transition	(60)

TOTAL CHANGE TO ANNUAL REVENUE POSITION **Neutral**

- 7.8 The accelerated technology equipment replacement programme is well underway; this will enable Smarter Working to progress. It is being funded by bringing forward funds earmarked for the next 2 financial years, that would probably been utilised for more general equipment replacement (this equates to £150K p.a. over the next 2 years).

8. Recommendation

- 8.1 The Panel are asked to:

- i) Endorse the Strategic Approach to Smarter Working.
- ii) Support the utilisation of £1.25M of the MTFP Smarter Working budget previously approved by Council in 2018 to 2020.

For further information contact:

Bob Jackson
 Chief Executive
 Tel: 023 8028 5588
 Email: bob.jackson@nfdc.gov.uk

Background Papers:

None

This page is intentionally left blank

CORPORATE OVERVIEW & SCRUTINY PANEL – 27 SEPTEMBER 2018

COUNCIL TAX REDUCTION SCHEME 2019/20

1. INTRODUCTION

- 1.1 Members will recall that local authorities are responsible for setting their own local Council Tax Reduction Scheme for those of working age on low income. The Government stipulated that there must be no change to the level of help that pensioners receive and there are no plans to localise the scheme for this group. There are also no plans to include Council Tax Reduction within Universal Credit.
- 1.2 The Council Tax Reduction Scheme must be formally made by the Council no later than 11 March in any year, to take effect from 1 April 2019. The Government has constructed rules for a 'default scheme' which will have to be operated by any council that does not make a local scheme. This replicates the former rules for council tax benefit. It is contained in schedule 1 of The Council Tax (Default Schemes) (England) Regulations 2012.
- 1.3 Our Council Tax Reduction Scheme fulfils the prescribed requirements for localised schemes.
- 1.4 Approximately 8,500 claimants are receiving Council Tax Reduction. Of these 2,600 are working age (900 are working), 1,600 are vulnerable and 4,300 are of pensionable age.
- 1.5 The current Council Tax Reduction Scheme costs approximately £8.55 million. This is split between:

Working Age employed	£ 611,000
Working Age other	£1,555,000
Vulnerable	£1,746,000
Pensioner	£4,638,000

The cost is shared between New Forest District Council, Hampshire County Council, Hampshire Police and Hampshire Fire and Rescue.

- 1.6 When the Council Tax Reduction Scheme was introduced, approximately 90% of the cost was reimbursed by the government within the formula grant process. The balance of the cost was shared by the council and the Precepting bodies as part of the tax base collection. Changes to the amount of Council Tax Reduction awarded now affects the tax base of each organisation and is no longer identified within the overall formula grant allocation.

2. REVIEW PROCESS

- 2.1 The Task & Finish Group met to review the current scheme and propose changes effective from 1 April 2019.
- 2.2 The recommendations of the Task & Finish Group are to be considered by the Corporate Overview Panel and Cabinet and full Council.

3. THE CURRENT LOCAL COUNCIL TAX REDUCTION SCHEME

- 3.1 The council's Council Tax Reduction Scheme protects the vulnerable. A person is vulnerable if they (or a partner) are in receipt of Disability Living Allowance, Personal Independence Payments or Severe Disablement Allowance.
- 3.2 The council's Council Tax Reduction Scheme for 2018/19 requires all working age claimants (except the vulnerable) to pay a minimum of 10% council tax.
- 3.3 The council's Council Tax Reduction Scheme also includes:
- A. Council tax reductions are capped at band D (so that claimants living in higher banded properties receive any reduction based on band D). This currently affects 84 claimants.
 - B. A savings limit of £6,000, so that claimants on low income with more than £6,000 in savings are not entitled to any reduction.
 - C. The council's Council Tax Reduction Scheme incentivises work by disregarding £25.00 a week of earnings across all claimant groups. The government disregards in Housing Benefit are £25.00 for a lone parent, £20.00 for a disabled claimant, £10.00 for a couple and £5.00 for a single claimant.
 - D. The maximum period for backdating a claim is 4 weeks (previously 6 months).
 - E. To limit the number of dependent children within the calculation for Council Tax Reduction to a maximum of 2 for new claims and entitlements (some exemptions apply).
 - F. To use the gross Universal Credit payment as income in the calculation of Council Tax Reduction

4. MATTERS CONSIDERED BY TASK & FINISH GROUP

- 4.1 Collecting council tax from those on low income is difficult, with significantly more work for officers. Administration has also increased, notably in recovery and working with those affected. In 2018/19 council tax bills increased, meaning council tax payers having to pay more. This is likely to continue in the forthcoming years. It is not anticipated that wages will increase at the same rate, which affects roughly one-third of working age claimants.
- The collection rate for those in receipt of Council Tax Reduction, who are not a pensioner or vulnerable, has increased from 81.42% to 83.27% and overall collection rate for those in receipt of Council Tax Reduction increased from 88.67% to 91.12% (see Appendix 2).
- 4.2 Many of the claimants have also been affected by other welfare reform changes, including the spare room subsidy, the benefit cap, as well as an increase in the cost of living. Many working age state benefits are being frozen for the next 2 years, including the Local Housing Allowance despite rents increasing, and there are further welfare reforms, including the continued roll-out of Universal Credit.

5. DISCUSSION ON COUNCIL TAX REDUCITON SCHEME FOR 2019/20

- 5.1 The group considered options relating to various aspects of the current scheme. This included:
- A. No changes to the scheme. This would not affect claimants as their support would not reduce. A declining caseload may result in reduced costs (see Appendix 1).
 - B. The minimum contribution – This is currently 10% (except the vulnerable). Officers advised that collection rate is 83.27% and that those paying the 10% have become accustomed to this level of payment. Any increase could cause financial hardship and officers consider there is a “tipping point” where an increase in minimum contributions will result in less council tax being paid and increased administration. Officers do not know where this tipping point is. In considering 4.1 and 4.2 the Group considered that the minimum contribution should remain at 10%
 - C. Child Care Costs – The Group discussed whether child care costs should be disregarded using the same amounts as Universal Credit which is 85% of existing amounts. This would only apply to new claims, due to system constraints, who would be worse off than existing claims. Many new Council Tax Reduction claims will have an existing Housing Benefit claim, therefore if the child care disregard was to change there would have to be two separate calculations which increases administration. The Group agreed to keep existing disregard amounts and to review this once Universal Credit is fully rolled-out.
 - D. Earnings disregards – To incentivise work £25.00 per week is disregarded from earnings. The Group considered that the £25.00 per week should remain.
 - E. Minimum change – The Group discussed a de minimis rule for small changes to entitlement. Due to income fluctuations, entitlement to Council Tax Reduction may change, even by as little as 10p per week. Approximately, 30% of changes to entitlement are under £1.00 per week. This requires a new calculation, the printing and issuing of a decision notice, changes to council tax instalments and a revised council tax notice. The Group considered a threshold of £1.00 whereby any change in weekly entitlement, both positive and negative, will not affect entitlement.
 - F. Backdating period – The Group reviewed the backdating period of 1 month and considered the one month period should remain.
- 5.2 Therefore, after considering these options, the Group decided to consult on option A and E.

6. CONSULTATION

- 6.1 The council has a duty to consult on any changes to the scheme, even if it is proposed that no changes are made. The Council undertook a consultation exercise over a 6 week period, from 30 July 2018 to 9 September 2018. The consultation was advertised on the council’s website, Facebook page, Twitter and on correspondence sent to recipients of a Council Tax Reduction. The major preceptors and Citizens Advice were also contacted.

- 6.2 The council only received 8 responses. Due to the minimal responses it is not possible to draw any real conclusions. However, most responses supported the recommendations.

7. FINANCIAL IMPLICATIONS

- 7.1 The financial implications of each of the options were discussed.

Option A may incur minimal, or less costs as caseload reduces. Savings to New Forest District Council will be even smaller as the council retains approximately 11% of the total council tax collected.

Option E savings will generate some savings, estimated to be circa £10,000, due to reduced administration, printing and posting.

Therefore, the overall impact of these changes will be minimal.

8. PORTFOLIO HOLDER COMMENTS

- 8.1 TBC

9. RECOMMENDATIONS

- 9.1 It is recommended to Corporate Overview Scrutiny Panel and to the Cabinet that option E in paragraph 5.1 be adopted.

Background Information:

Minutes of Task & Finish Group
Caseload graph
Collection statistics
Recovery notices comparison

Further Information:

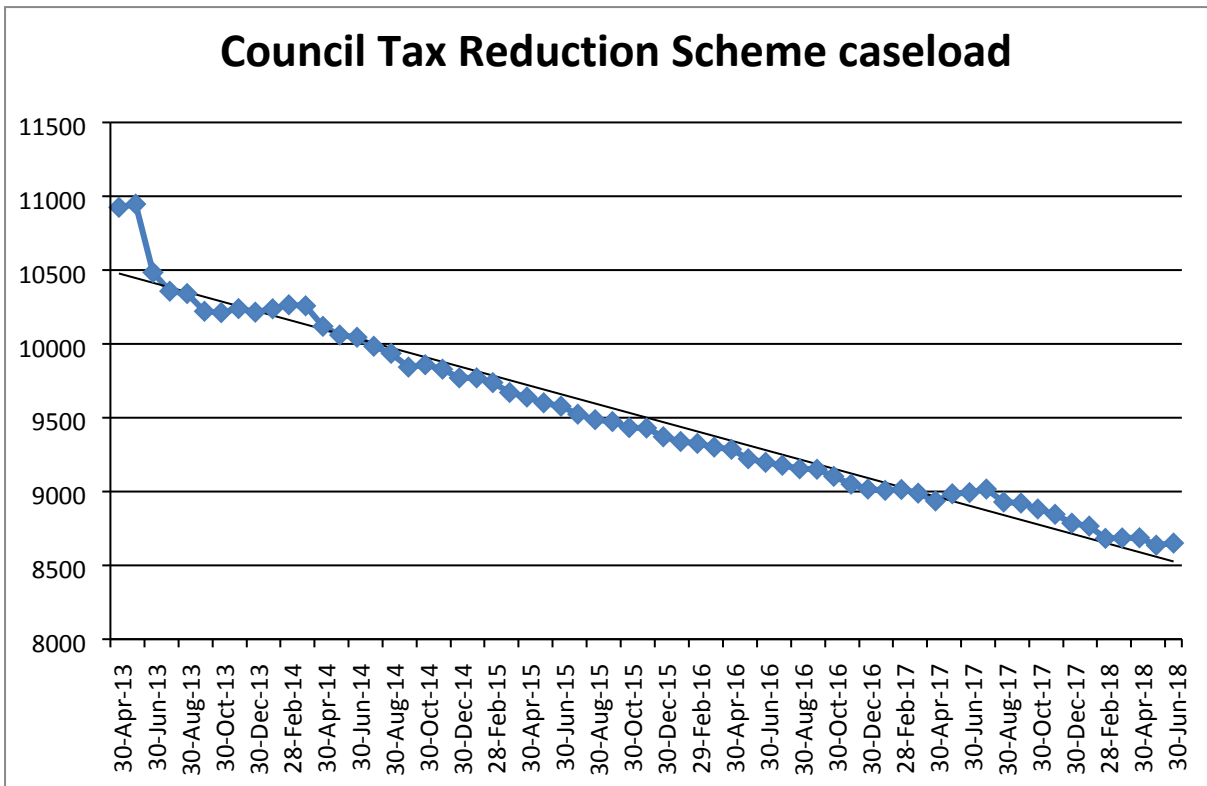
Members of Task & Finish Group: Cllrs Alan Penson, Miss A Sevier, DN Tungate, Mrs CV Ward

Portfolio Holder: Cllr Jeremy Heron

Lead Officer:

Ryan Stevens Service Manager – Revenues and Benefits
ryan.stevens@nfdc.gov.uk

Council Tax Reduction Scheme caseload



Appendix 2 – Collection statistics

POSITION STATEMENT AS AT 31.3.18

	Nett Amount Due	Total Amount Paid	Outstanding Balance	Collection %
ALL DEBT	£ 114,222,565.18	112,841,976	£ 1,380,589.58	98.79%
REDUCTION SCHEMES				
WORKING AGE EMPLOYED	£ 655,399.00	£ 556,583.01	£ 98,815.99	84.92%
WORKING AGE OTHER	£ 441,574.45	£ 356,823.97	£ 84,750.48	80.81%
WORKING AGE CLAIMANT - MAXIMUM REDUCTION CAPPED AT 90%	£ 1,096,973.45	£ 913,406.98	£ 183,566.47	83.27%

POSITION STATEMENT AS AT 31.3.17

	Nett Amount Due	Total Amount Paid	Outstanding Balance	Collection %
ALL DEBT	£ 108,557,130.06	£ 107,368,450.00	£ 1,188,679.00	98.91%
REDUCTION SCHEMES				
WORKING AGE EMPLOYED	£ 615,602.03	£ 521,129.00	£ 94,472.00	84.65%
WORKING AGE OTHER	£ 420,582.91	£ 322,499.00	£ 98,083.00	76.68%
WORKING AGE CLAIMANT - MAXIMUM REDUCTION CAPPED AT 90%	£ 1,036,184.94	£ 843,628.00	£ 192,556.00	81.42%

Appendix 3 – Council Tax Recovery Notices

2013/14	Taxpayers in receipt of CTR	Taxpayers not in receipt of CTR
Reminder	6,805	12,729
Summons	1,289	3,572

2014/15	CTR	Non-CTR
Reminder	6,871	12,727
Summons	1,344	3,828

2015/16	CTR	Non-CTR
Reminder	5,607	13,117
Summons	1,103	3,477

2016/17	CTR	Non-CTR
Reminder	5,485	13,250
Summons	1,082	3,321

2017/18	CTR	Non-CTR
Reminder	5,175	13,141
Summons	888	3,360

This page is intentionally left blank

COUNCIL TAX DISCOUNTS AND EXEMPTIONS, VOLUNTARY PAYMENT AND RELATED POLICIES

1. INTRODUCTION

- 1.1 The purpose of this report is to consider the recommendations of the Council Tax Reduction Task and Finish Group on various Council Tax exemptions and discounts, and also a proposal concerning voluntary Council Tax payments.
- 1.2 The Task and Finish Group were asked to consider a Voluntary Payment from all council tax payers in the highest valuation band, Band H.
- 1.3 The Group also undertook a review of discretionary council tax discounts and the introduction of a premium which were last considered in December 2013 and policies concerning business rate reliefs and debt collection and recovery.
- 1.4 The recommendations of the Task & Finish Group are to be considered by the Corporate Overview Panel, Cabinet, and full Council.
- 1.5 The effective date of any change is 1 April 2019.

2. THE CURRENT COUNCIL TAX DISCOUNTS

- 2.1 The Task and Finish Group met to review the current discretionary discounts to council tax payers who meet specified criteria. These are summarised as follows:

Discount	Conditions	Discretion available	Current discount	Quantity
Prescribed Class B	Property is unoccupied and furnished (commonly known as a second home)	Discount of up to 50%	0%	1,500
Prescribed Class C	Property is unoccupied and substantially unfurnished	Discount between 0% and 100% for up to 6 months. Both amount and duration are discretionary.	100% for 1 month from date property first becomes unoccupied and unfurnished	4,002 (17/18)
Prescribed Class D	Property is unoccupied and substantially unfurnished and requires major repair works to render it habitable.	Discount between 0% and 100% for 12 months. The duration is non-discretionary, only the amount.	50%	528 (17/18)
Empty Homes Premium	Unoccupied and substantially unfurnished for 2 years or more	Currently the premium is 50%. From April 2019, we can charge a premium of up to 100% (doubling the amount due).	0%	158

3. DISCUSSION ON DISCOUNTS AND EXEMPTIONS BY TASK & FINISH GROUP

3.1 The Group discussed the above discounts.

- A. **Prescribed Class B (Second Home).** This discount applies to properties which are unoccupied and furnished, commonly known as second homes. Local authorities have the discretion to set a discount of up to 50%. From 2013 members decided not to award a discount and to charge the full council tax.

The Group recommend no change.

- B. **Prescribed Class C.** This discount applies to properties which are unoccupied and substantially unfurnished. Local authorities have the discretion to set a discount of between 0 and 100% for any period up to 6 months. The discount applies from the date the property first becomes unoccupied and substantially unfurnished. After the discount ends, the full council tax is payable.

The current discount is 100% discount for 1 month. The reasoning for the current discount is to allow sufficient time for changes in occupation or minor works to be undertaken. Members considered that this should encourage prompt turnover of property and reduce “voids”. It also avoids billing landlords for small sums between lets.

The Group recommend no change.

- C. **Prescribed Class D.** This discount applies to properties which are unoccupied and unfurnished and where major repair works or structural alterations are required or under way, often referred to as “uninhabitable”.

Local authorities have the discretion to set a discount of between 0 and 100% for a maximum period of 12 months. There is no discretion on the duration, only the amount of discount. After the discount ends, the full council tax is payable. The current discount is for 50% for 12 months. This is to reflect that the liable party cannot occupy the property.

The Group recommend no change.

- D. **Empty Homes Premium.** Since April 2013 local authorities have the discretion to charge a premium of 50% in council tax where a property has been unoccupied and substantially unfurnished for two years or more.

The government have stated that they “want to address the issue of empty properties. It can’t be right to leave a property empty when so many are desperate for a place to live”. Two years is considered sufficient time for home owners to sell, rent or complete any major renovations that might be required. The premium seeks to incentivise owners to bring their properties back into use. Under the Council Tax (Empty Dwellings) Bill 2018, from April 2019 local authorities will have the discretion to charge a 100% “council tax premium on empty properties”, thereby doubling the amount due. The government is proposing additional changes, which have yet to be legislated, to enable local authorities to charge further premium of:

- 200% from April 2020 where the property has been empty for more than 5 years
- 300% from April 2021 where the property has been empty for more than 10 years

There are certain exemptions in place for homes that are empty due to the occupant living in armed forces accommodation for job-related purposes, or to annexes being used as part of the main property. Not an exemption, but guidance states consideration should be given for properties which are genuinely for sale or available to rent and that owners should not be penalised in cases of hardship. These decisions will be made on a case by case basis.

All councils in Hampshire, with the exception of Gosport, Winchester and ourselves, charge the 50% premium, and these councils are reviewing their policies this year. The Group discussed a staggered approach, e.g. 50% from 1 April 2019 and 100% from 1 April 2020?

The potential additional total income could be £250,000 (£27,500 to NFDC) but taxpayers affected could furnish the property so that the premium no longer applies.

The Group support the government and recommend a 50% premium from 1 April 2019. This will be reviewed in 2019 with a view to increasing the premium to 100%. If the proposal is approved, all taxpayers who will be liable to the pay a premium will be sent a letter as soon as practically possible.

- E. **Care Leavers.** Care Leavers are adults who have spent time in foster or residential care, or in other arrangements outside their immediate or extended family before the age of 18. They are a particularly vulnerable group. From a report from The Children's Society, care leavers when moving into independent accommodation begin to manage their finances for the first time. Local Authorities have been encouraged to exempt care leavers from paying council tax up to the age of 21. This includes the Governments "Keep on caring" strategy. We do not know exactly how many council tax payers this would affect as there is no need to disclose this information. We are aware of four care leavers receiving Housing Benefit, all under 21, all are renting a room in a property so are not liable for council tax.

Exemptions are permitted under S13A Local Government Finance Act 1992.

Some councils have introduced the exemption, but with variances, for example up to the age of 21, up to the age of 25 or up to 21 with discretion up to the age of 25 depending on their circumstances. However, this may lead to appeals and disputes due to judgment calls.

The Group discussed that this exemption would have little or no impact and open up further discussions on what other cohorts are deserving cases for their own class of exemption.

The Group notes that if the care leavers circumstances are such that paying council tax is difficult there is the Council Tax Reduction Scheme to support those on a low income and our Exceptional Hardship Scheme is also available to provide further additional support if appropriate.

The Group recommend not to introduce a local exemption class for care leavers.

4. DISCUSSION ON NATIONAL NON-DOMESTIC RATE RELIEF POLICY

- 4.1 The Group discussed the National Non-Domestic Rate Relief Policy (Appendix 1). This brings together our existing rate relief policies into a single policy document and confirms the review procedures.
- 4.2 The Group support the policy and recommend its approval.

5. FAIR COLLECTION AND DEBT RECOVERY POLICY

- 5.1 The Group discussed the Fair Collection and Debt Recovery Policy for the Revenues and Benefits Service (Appendix 2).
- 5.2 Local Authorities are encouraged to approve a policy on how collection and debt recovery is administered. Nationally, Local Authorities have been criticised on how they deal with debts, in particular council tax. This policy ensures the councils approach to debt collection is transparent.
- 5.3 By introducing a collection and debt recovery policy this enables the council to sign up to Citizens Advice Council Tax protocol.
- 5.4 The Group support the policy and recommend its approval.

6. VOLUNTARY PAYMENT

- 6.1 The Group discussed the following proposal of Cllr D Harrison which was made on 26 February 2018 at Council and was referred to this group for consideration:

This authority, when sending out council tax bills, includes an invitation to residents living in Band H properties to pay a voluntary additional sum of £100, £250 or £500 which the Council will use to support programmes that maintain and improve public services, especially those that have most impact on the poorest, most vulnerable members of our community”.
- 6.2 There are currently 607 residents living in Band H properties, 68 of whom receive single person discount.
- 6.3 The Group noted an existing scheme by Westminster Council which, from April 2018, has operated the scheme through a Charity Trust to utilise Gift Aid. Westminster Council has 15,600 Band H properties and has the lowest council tax in the country despite being a very affluent area. Following public consultation, 50% of those consulted supported the scheme.
- 6.4 To date, approximately 2% of those in a Band H property have made a voluntary payment and £400,000 has been received. If we introduce our own scheme and have a similar take-up from our Band H taxpayers, it would equate to approximately 12 donations amounting to a maximum of £6,000.

- 6.5 The Group considered the cost of printing, posting and administration and also the potential impact this could have on existing charitable donations. It was felt those who make a voluntary payment may do so instead of giving to other charities. When considering these factors and the likely level of potential income, the Group decided to recommend that this proposal be not supported.
- 6.6 The Group discussed other ways of raising awareness of the Chairman's charities to encourage contributions from the public and asked officers to look into this corporately.

7. PORTFOLIO HOLDER COMMENTS

- 7.1 TBC

8. RECOMMENDATIONS

- 8.1 It is recommended to Corporate Overview and Scrutiny Panel that options A to E as set out in paragraph 4.1 are approved.
- 8.2 It is recommended to Corporate Overview and Scrutiny Panel the National Non-Domestic Rate Relief Policy and the Fair Collection and Debt Recovery Policy are approved.
- 8.3 That the proposal by Cllr D Harrison, in respect of voluntary additional Council Tax payments as referred to in paragraph 6 of the report, be not supported, for the reasons stated.

Background Information:

Minutes of Task & Finish Group

Further Information:

Members of Task & Finish Group: Cllrs Alan Penson, Miss A Sevier, D N Tungate, Mrs C Ward

Portfolio Holder: Cllr Jeremy Heron

Lead Officer:

Ryan Stevens Service Manager – Revenues and Benefits
ryan.stevens@nfdc.gov.uk

This page is intentionally left blank



New Forest District Council

Revenues and Benefits Service Rate Relief Policy

Contents

1. Introduction
2. Policy Aims
3. Rural Rate Relief
4. Registered Charities
5. Registered Community Amateur Sports Clubs
6. Sports Clubs and Not For Profit Organisations
7. Small Business Rate Relief
8. Hardship Rate Relief
9. Partly unoccupied properties
10. Applications
11. Awards
12. Notification and appeals
13. Financial implications
14. Review

1. Introduction

The Council recognises the importance of supporting local businesses and organisations to promote the provision of economic growth and local facilities. Councils have the power to grant rate relief to organisations that meet certain criteria and this policy applies to applications for rate relief for National Non-Domestic Rates (Business Rates). Rate Relief can be mandatory, discretionary or both, and is granted in accordance with the Local Government Finance Act 1988 and 2012.

This policy specifies the factors that will be considered when deciding whether to award a relief. All applications will be decided on its merits and we will treat all customers fairly and equally.

2. Policy Aims

Public funds are not unlimited and a proportion of the costs of the rate relief granted is borne by local council tax payers. In making decisions, the Council must be satisfied that awarding a rate relief will benefit the community.

This policy aims to ensure consistent and transparent decision making.

The Council will treat all ratepayers equally, will consider all applications on their individual merits, and will seek through administering this policy to meet corporate objectives and support local businesses and organisations.

3. Rural Rate Relief

Mandatory Rate Relief

50% rate relief shall be awarded where the ratepayer occupies the only general store or post office within a rural settlement and the rateable value is less than £8,500. It also applies to the occupier of a pub or petrol station with a rateable value of £12,500 or less in a rural settlement if it is the only pub or petrol station in the settlement.

A rural settlement is defined as a rural area with a population of below 3,000 and the list is published on the Council's website.

Discretionary Rate Relief

The government had intended to legislate for 100% mandatory rate relief but instead opted to provide a fully funded Discretionary rate relief scheme for any ratepayer who meets the mandatory rate relief criteria. Therefore, 50% discretionary rate relief will be awarded in all cases where the occupier is entitled to the 50% mandatory rate relief.

In addition, 100% discretionary rate relief can also be awarded where the ratepayer occupies a property within a rural settlement with a rateable value of less than £16,500 and where the council considers the property provides a clear benefit to the local community.

Reviews

All mandatory and discretionary rate relief awards will be reviewed every 5 years.

4. Registered Charities

Mandatory Rate Relief

80% rate relief shall be awarded where:

- (a) the ratepayer of a property is a registered charity and
- (b) the property is wholly or mainly used for charitable purposes

Reviews

All mandatory rate relief awards will be reviewed every 5 years

Discretionary Rate Relief

20% discretionary rate relief can be awarded where the ratepayer is entitled to the mandatory rate relief where the property is used to provide a service or benefit to the community, is open to all the community, is able to demonstrate financial hardship and is not a charity shop used for the sale of donated items.

Reviews

Discretionary Rate Relief awards will be subject to the following review periods:

- (a) Every 5 years where the annual value of the discretionary rate relief award is £1,500 or less
- (b) Every 3 years where the annual value of the discretionary rate relief award is between £1,500 and £4,000
- (c) Every 2 years where the annual value of the discretionary rate relief award is more than £4,000

5. Registered Community Amateur Sports Clubs

Mandatory Rate Relief

80% rate relief shall be awarded where the ratepayer is registered with HMRC as a Community Amateur Sports Club.

Discretionary Rate Relief

The council has decided not to make any discretionary awards.

Reviews

Any mandatory rate reliefs will be reviewed every 5 years.

6. Sports Clubs and Not For Profit Organisations

The council has the discretion to award discretionary rate relief of up to 100% of the business rates on properties occupied by a sports club and not-for-profit-organisations. Applications will be treated on their own merits and in consideration of the interests of local taxpayers.

To be eligible for consideration, the property must be:

- (a) Wholly or mainly used for the purposes of recreation and all or part of it is occupied for the purpose of a club, society, or other organisation not established or conducted for profit; or
- (b) Is occupied for the purposes of one or more institutions or other organisations, none of whom are established or conducted for profit and each of whose main objectives are charitable or are otherwise philanthropic or religious or concerned with education, social welfare, science, literature or the fine arts.

The organisation should be able to demonstrate a financial need for rate relief. The government has provided some guidance when considering an application.

Access and membership

- (a) Is membership open to all sections of the community? There may be legitimate restrictions placed on membership, e.g. where the capacity of the club is limited. Organisations will not be considered if the membership rate is high and therefore excludes the general community.
- (b) Does the organisation actively encourage membership from across the community? Examples could be young people, older age groups, persons with disabilities, ethnic minorities etc.? Organisations which do not encourage such membership may not be successful.
- (c) Are the facilities made available to the community, other than just members? The wider use of facilities should be encouraged and promoted.
- (d) Is the organisation affiliated to local or national organisations, e.g. local sports or arts councils, national representative bodies? i.e. are they actively involved in local/national development of their interests

Provision of facilities

- (a) Does the organisation provide training or education to its members, or schemes to develop skills?
- (b) Have the facilities available been provided by self-help or grant aid? An organisation that uses or has used self-help or grant aid for construction, maintenance or provision of facilities may be considered favourably.
- (c) Does the organisation have a bar? Having a bar should not in itself be a reason for not granting relief. The Council will look at the main purpose of the organisation, for example bringing people together with similar interests. In sports clubs for example the balance between playing and non-playing members might provide a useful guide as to whether the main purpose of the club is sporting or social activities.
- (d) Does the organisation provide facilities which indirectly relieve the Council of the need to do so, or enhance and supplement those which it does provide? The Council will not refuse to grant rate relief on the grounds that an organisation is in competition with the Council itself, but will look at the broader context of the needs of the community as a whole. A new need, not being provided by the Council but identified as a priority for action, might be particularly deserving of support.

Reviews

Discretionary Rate Relief awards will be subject to the following review periods:

- (a) Every 5 years where the annual value of the discretionary rate relief award is £1,500 or less

- (b) Every 3 years where the annual value of the discretionary rate relief award is between £1,500 and £4,000
- (c) Every 2 years where the annual value of the discretionary rate relief is more than £4,000

7. Small Business Rate Relief

Small business rate relief shall be awarded based on the following criteria:

- (a) There is mandatory rate relief of 100% where the ratepayer occupies a property with a rateable value of £12,000 or less, or if more than one property is occupied and the additional properties have a rateable value of less than £2,900 and the combined rateable value of all the properties is not more than £20,000,
- (b) Rate relief is awarded on a sliding scale where the ratepayer occupies one main non-domestic property with a rateable value of between £12,000 and £15,000, or if the ratepayer occupies more than one non-domestic property, each additional property has a rateable value of less than £2,900 and the total rateable value of all properties is less than £20,000.

Where a demand notice is issued to a ratepayer and the property has a rateable value that potentially meets the above criteria an application form will be sent with the notice.

Reviews

All awards will be reviewed every 5 years

8. Hardship Rate Relief

The Council will consider applications for hardship rate relief of up to 100% of the business rates due by taking into consideration the following:

- (a) the ratepayer would sustain hardship if the authority did not do so; and
- (b) it is reasonable for the authority to do so, having regard to the interests of persons subject to its council tax.

The intention is to support businesses in the short term, with awards usually being for a maximum period of 6 months, to allow the business to recover or manage a decline. Government guidelines advise that the awarding of rate relief should only be in exceptional circumstances. The test of hardship is not necessarily confined to financial hardship; all relevant factors affecting the ability of a business to meet its liabilities will be taken into consideration. It is the ratepayer's responsibility to demonstrate hardship and to supply supporting evidence.

The council is open and transparent and as such, any hardship award must fulfil the test as to whether council taxpayers would consider the award to be reasonable and in their best interests.

Any award will be an exception and when making a decision, we will consider the following:

- (a) Whether the business provides a service to the community
- (b) Whether the service provided is obtainable elsewhere within a reasonable distance
- (c) Whether there is a genuine prospect of the business going out of business without an award

- (d) The number of persons employed by the business
- (e) Whether there is a genuine prospect of the business continuing in the long term after an award
- (f) The latest figures available for net profit/loss, and the cost of business rates as a percentage of total business expenses and gross profit.
- (g) If the hardship is not just the result of economic or market factors, nor due to excessive drawings or outgoings.
- (h) What steps the ratepayer has taken to alleviate the hardship
- (i) Details of why the business is experiencing hardship
- (j) How long the business has been trading. An award of Hardship rate relief will not be made for the purpose of enabling a new business to become established except where the viability of the business is threatened by events that could not reasonably have been foreseen when establishing the business
- (k) If the property is unoccupied, awards will only be made in exceptional circumstances and where there are clear benefits to council tax payers
- (l) The ratepayers history of business success or failure

9. Partly unoccupied properties

Where part of a property is unoccupied for a short time the council has discretion to reduce the rates on a property by awarding up to 100% rate relief in respect of the unoccupied part of the property. The council will ask the Valuation Office Agency to apportion the rateable value between the occupied and unoccupied parts of the property.

In deciding whether to award a rate relief the following factors will be considered:

- (a) The reasons for the part occupation
- (b) The expected duration of any part occupation
- (c) Previous awards to the same organisation

The rate relief can apply for a maximum of 6 months for industrial properties and a maximum of 3 months for non-industrial properties.

10. Applications

An application must be made in the format prescribed by the council and include any supporting evidence the council considers necessary. This could include audited accounts and recent bank statements.

Where requested information and evidence is not supplied the Council will not make an award.

11. Awards

Any award shall generally only apply to the year in which an application is made. Any reliefs awarded will be applied directly to the business rates account. Any overpaid relief will be recovered. Reliefs will cease where:

- (a) The applicant ceases to be liable for business rates,
- (b) The property for which relief is granted becomes empty,
- (c) The use of the property changes
- (d) The aims or objectives of the organisation changes

Requests for backdating an award will only be considered in exceptional circumstances and subject to the following legislative restrictions:

- (a) If the application is received by 30 September, the award can be backdated to 1 April of the previous financial year
- (b) If the application is received after 30 September, the award can only be backdated to 1 April of the current financial year

12. Notification and appeals

The Council will notify ratepayers within one month of making their application and providing all the supporting information.

Where an award is made notification will be sent to confirm the amount and duration of the award and the ratepayers revised liability. The ratepayer will be required to notify the council of any changes in their circumstances that could affect the award.

Where the decision is not to make an award reasons will be provided in the notification

A decision will be made by the Revenues Manager. There are no formal rights of appeal. However, should the ratepayer disagree they can request a reconsideration to the Service Manager Revenues and Benefits within one month of the decision, clearly stating the reasons why they disagree with the decision. The ratepayer will be notified of the decision within one month of receipt of the reconsideration request.

Ratepayers should continue to pay any amounts due whilst the application is awaiting a decision, unless the Council has agreed with the ratepayer that payments are suspended.

13. Financial implications

The implications of awarding a Discretionary Rate Relief are that the cost to the Council is 20% of the award.

14. Review

The council will review this policy every 5 years or earlier if legislation changes.



**Revenues and Benefits Service
Fair Collection and Debt Recovery
Policy**

1. Introduction

The Council has a legal duty to recover all sums due to the Council. A collection and debt recovery policy ensures that collection methods are fair to everyone, especially those on low incomes. This Policy covers the collection of Council Tax, Business Rates, Sundry Income, Housing Benefit and Council Tax Reduction overpayments and has been written after taking the views of Citizens Advice New Forest whose assistance with providing debt advice is invaluable.

It is recognised that people do not pay their debts for a variety of reasons.

The council will ensure that no individual is discriminated against on the grounds of sex, race, disability, age, sexual orientation or other personal attributes.

Some people, because of living in or on the margins of poverty, will have difficulty in paying. The Council will use its best endeavours to help such people and to minimise the impact of debt on them. Some people may deliberately set out to delay or not make payments and all methods of enforcement will be used to secure payment in these cases.

Some people may be able to pay but do not pay because of an oversight or personal difficulties and not because of a deliberate decision to avoid or delay payment. The Council will seek to help such people develop a culture of payment by encouraging them to get in contact and discuss any difficulties.

The need to contact the council is central to the Policy. Where a person makes contact their circumstances will be considered with a view to agreeing a reasonable payment arrangement, minimising recovery action and helping to alleviate hardship. Where people fail to make contact or maintain arrangements, recovery of the debt will continue.

2. Benefits of a debt collection policy

The Policy will:

- a) Help to identify deliberate non-payers or people who delay payment
- b) Enable people who fall into arrears to come to payment arrangements appropriate to their circumstances
- c) Make sure that when we take enforcement action it is appropriate and likely to be effective
- d) Help to reduce the effect of debt on people on low income
- e) Mean that by being approachable individuals will be more willing to contact us when they first face difficulties

3. Aims of the Policy

The aims of the Policy are to:

- a) Take positive action to prevent arrears occurring
- b) To provide a range of payment methods
- c) Take enforcement action against deliberate non-payers
- d) Ensure prompt billing and to remind people quickly if they do not pay
- e) Encourage people to make early contact to avoid the build-up of debt

Where someone falls into arrears, officers will work with them, or their representatives, to agree reasonable payment arrangements which they can maintain.

4. Debt collection principles

The council:

- a) Considers that people have a responsibility to pay
- b) Aims to identify those who can pay but do not or who delay payment
- c) Actively encourages contact at every stage of the recovery process
- d) Aims to help maximise income and/or entitlement to discounts, exemptions, reliefs or benefits
- e) Will provide a service that is sensitive to individuals and their needs and sympathetic to those in hardship
- f) Will utilise all means of recovery available where appropriate

5. Notifications

The Council will provide prompt and clear information about the amount due, when the payments are due, how to make payments, details of discounts, exemptions and support and contact details. In all correspondence, it will be clearly written in plain English, without the use of jargon and where to obtain advice.

6. Making a payment

The Council promotes a payment culture and offers a variety of methods for paying bills and invoices. This includes by:

- Direct debit
- Standing Order – these are arranged by the individual with their bank. They must notify their bank of any changes to the amount due
- Phone – By contacting our office or using our telephone payments system
- On-line – By using the Council's secure payments service at www.nfdc.gov.uk
- Swipe card – These can be used at the post office
- Visiting a local council office
- On-line customer banking
- Cheques

Council Tax – there are three direct debit collection dates available, 1st, 15th and 23rd of the month.

For customers who do not pay by direct debit, the default payment date is the first of the month although we can except an alternate payment date where we specifically agree this with the customer. Bills are sent in March requesting payments over 10 installments, April to January. Taxpayers can request instalments to be spread over 12 months and the Council will promote this where a taxpayer is having difficulty paying or is in arrears.

Business Rates has a direct debit collection date of 1st or 15th of the month.

Housing Benefit overpayments has a direct debit collection date of either 5th or 20th of the month.

Sundry Income has a direct debit collection date of the 1ST of the month.

The Council will publicise this information on our website, www.nfdc.gov.uk Whichever payment method is used, payment must be received by the due date.

7. Getting into arrears

Where an individual gets into arrears with their payment, the Council will:

- a) Expect priority debts, which includes council tax, to be paid before any non-priority debts
- b) Aim to maximise their income and inform them of their potential entitlement to state benefits, discounts, exemptions and reliefs
- c) Advise how they can obtain independent advice and work with third parties, including advice agencies
- d) Undertake basic debt advice which will include reviewing income and expenditure, discussing plans to repay priority debts and referrals to more specialist support, e.g. Citizens Advice New Forest.

The Council will agree a payment plan with the individual that reflects the ability to pay and the level of debt outstanding. This will take into consideration:

- a) The amount of arrears
- b) The period of time taken to pay the arrears
- c) Their payment history
- d) Their financial situation, including reasonable living expenses

Where a payment arrangement is agreed, the Council will notify the person of this. Where payments are made as agreed, no further recovery steps will be taken. Where an individual does not provide information or give details of their income and expenditure the Council may refuse the arrangement and pursue alternative means to recover the debt.

Where the council receives a payment which does not match an instalment, the sum paid will be used to reduce the oldest debt.

8. Council Tax and Business Rates Recovery Process

In accordance with legislation, where payments have not been made, the Council will seek recovery through the following:

Reminder Notice

A Reminder Notice is issued where an instalment is due and has not been paid. The notice will request the amount overdue to be paid within 7 days. If payment is not received within a further 7 days the full remaining balance of the years council tax or business rates will become due.

At this stage, where the customer contacts the council, council staff will be able to offer a number of alternatives:

- Re-profile the instalments to spread the payments
- Check entitlement to any discount, exemptions or reliefs

- Special arrangements, e.g. weekly payment or double payment to be made on the next instalment
- Check for Council Tax Reduction entitlement

Second Reminder

Where payments are brought up to date following the issue of a Reminder Notice, but then a further payment becomes overdue a second reminder is issued. If payment is not received within a further 7 days the full remaining balance of the years council tax will become due.

If the taxpayer is in receipt of Council Tax Reduction, they will always receive two reminder notices before further recovery proceedings.

Final Notice – Council Tax

A Final Notice is issued where payment becomes due after issuing a reminder or second reminder and the right to instalments is lost and the full remaining balance for the year becomes due within 7 days.

The Council will be able to offer the alternatives above to assist the taxpayer.

Complaint

Where the amount is still due the council will make a complaint to the magistrate's courts requesting the issue of a liability order. Before making the complaint the council will check to ensure the summons is properly served.

Once the complaint is made to the court the magistrates will issue a summons to attend a liability order hearing. This summons is issued advising that the right to pay by instalments is lost and the full balance outstanding should be paid immediately. The summons advises that failure to pay the sum due or contact the council will result in a liability order being granted by the magistrates.

Where a summons and liability order is issued and granted a cost of £70.00 is added to the account.

Liability Order

Once a liability order is granted by the magistrates the council will send the taxpayer a liability order notice along with a request for financial information.

Where the taxpayer has contacted the council, the council will:

- Agree a payment plan, aiming to pay the balance due within the financial year to avoid starting the next financial year in arrears
- Encourage payment by direct debit
- Monitor payment arrangements to ensure compliance

Where the taxpayers does not contact the council, make a payment, or defaults on an agreed payment plan, the council will consider the most appropriate recovery method. For Council Tax this includes:

- Attachment to state benefits , such as Jobseekers Allowance/Universal Cred/Income Support or Pension Credit

- Attachment to earnings

The amount deducted is determined by legislation.

Where the debtor does not contact the council and the above methods of recovery are not available, the debt will be passed to an Enforcement Agent. This will incur additional costs. Enforcement Agents operate within a legal framework with a regulated fee structure. They will agree payment arrangements appropriate to the circumstances. Where the Enforcement Agent becomes aware that the debtor is vulnerable they will contact the council to seek further advice.

In exceptional circumstances and only with the council's permission, the Enforcement Agent can take possession of goods if payments are not made.

The council will only recall a debt from a Collection Agency in exceptional circumstances, where it is in the best interests of all parties.

If the above options fail the Council will consider alternative recovery methods. This includes:

- Applying for a Charging Order on the property
- Applying for a bankruptcy or insolvency order
- Applying for a committal to prison – but only where all recovery methods have been considered, and the council considers that the debtor is wilfully refusing or has shown culpable neglect to pay and the debtor has failed to contact the council

9. Housing Benefit overpayments

An overpayment of benefit is any amount which has been paid but to which there was no entitlement. In accordance with regulations, the Council is responsible for recovering all overpayments of benefit and must:

- Establish any underlying entitlement
- Establish the cause of the overpayment
- Identify the period and amount of the overpayment
- Decide if the overpayment is recoverable
- Consider whether or not we will recover the overpayment
- Decide who to recover the overpayment from
- Notify any "person affected"
- Classify and record overpayments so we can make the correct rate of recovery

Where there is ongoing entitlement to Housing Benefit, any overpayment will be deducted from this amount, subject to specified amounts. The council will not reduce a person's weekly payable benefit to below 50 pence. If the amount being deducted is causing hardship the claimant can request a revised repayment arrangement based on their financial circumstances. The council will usually request completion of an income and expenditure form.

Where there is an overpayment and no ongoing entitlement to Housing Benefit the council will send an invoice. Where a claimant contacts the council we will agree a payment arrangement, taking into consideration their financial circumstances. Where the claimant does not contact the council within 14 days, or keep to the payment arrangement, the council will send a reminder. If there is still no contact within a further 14 days, the council

will send a Final notice. If there is still no contact the council can recover the overpayment by:

- Attachment to the claimants earnings
- Attachment to Social Security benefits
- Requesting another council recover the overpayment from Housing Benefit
- Collection Agency

10. Council Tax Reduction

Council Tax Reduction is paid by way of a credit to the claimants council tax account. Where an amount is paid that the claimant is not entitled to, e.g. failure to notify a change in circumstance, the council will consider if the amount is recoverable. Where the amount is recoverable the amount will be debited from the council tax account. The resulting outstanding council tax will be recovered in the same manner as other sums of council tax.

11. Sundry Income

An invoice will be issued as soon as possible. Payment will be due within 14 days, unless specified otherwise, e.g. monthly direct debits. If payment is not received within 7 days of the amount being due and the customer has not contacted the council, a reminder will be sent.

If the debt remains due the debt will be sent to a Collection Agency. Where the debt still remains due the council can apply to the court and obtain a County Court Judgment. This will incur costs. Once obtained the council may enforce the debt by applying for:

- An attachment of earnings order
- County Court bailiff

12. Arrangements made by advice agencies

Where the council is notified by the debtor that they are seeking advice from a relevant body, the council will consider whether it's appropriate to suspend recovery of the debt.

Where an arrangement is made by a recognised advice agency, an income and expenditure form will be provided. Offers of a payment plan received will be treated in good faith.

13. Write-offs

Where the council has exhausted all recovery methods and there is no genuine prospect of recovering the amount outstanding, the council will write-off the debt.

The council may reverse a write-off and resume recovery in certain circumstances, e.g. if they reclaim Housing Benefit.

14. Credit refunds

When a credit has built up on a council tax account before the credit is refunded the Council will contact other teams within the Council, including Housing, Benefits and Sundry Income to see if there are any outstanding sums owed. If there are outstanding debts the taxpayer must be contacted and agree that the credit can be transferred to the relevant debt to reduce or clear the amount owed. Any monies that remain in credit can then be refunded to the taxpayer.

Where there is more than one debt, the credit will normally be used to reduce or clear the biggest or oldest debt, or where it is in the interest of the taxpayer to avoid further recovery proceedings, for example possession of property.

15. Policy Review

We will review this policy every 5 years.

CORPORATE OVERVIEW & SCRUTINY PANEL - 27 SEPTEMBER 2018

REVIEW OF COMPLAINTS 2017/18

1. INTRODUCTION

- 1.1 This report provides an overview of complaints received, and dealt with, by the Corporate Complaints Team during the period 1 April 2017–31 March 2018. It includes those complaints of which the Council is aware were made to the Local Government and the Housing Ombudsmen (the Council is not always advised of complaints made direct to the Ombudsmen). Comparisons with the previous year (1 April 2016–31 March 2017) are included. The report excludes issues that have been referred to and dealt with by the Council's insurers.

2. PROCEDURE AND RECORDING OF COMPLAINTS

- 2.1 The Council's complaints procedure is attached at Appendix 1. It provides that
- all complaints at stage 1 are dealt with by the relevant Service Manager
 - if the complainant is not satisfied with the Service Manager's response, the complaint is dealt with at stage 2 by the relevant Executive Head
 - if the complainant remains dissatisfied, they may pursue their complaint to stage 3, when it is investigated by the Executive Head for Governance & Regulation on behalf of the Chief Executive.
- 2.2 Complaints recorded centrally have in the past been categorised by individual service/service manager. It is considered that it is more meaningful to the public and to Members to group complaints under broader heads, rather than by individual service/service manager. It is accepted that this makes direct comparisons with previous years difficult, but this will improve over time as records build up.

3. COMPLAINTS FOR 2017/18

- 3.1 Please see:

Appendix 2 - Complaints received by the Council and any escalation

Appendix 3 - Complaints referred to the Local Government or the Housing Ombudsman

Appendix 4 – Complaints found to be justified locally and financial settlements

- 3.2 It will be noted that a total of 66 complaints were received and logged at Stage 1 in 2017/18, compared with 65 in 2016/17. However, in the previous year, 2015/16, 97 were recorded. The reduction over the past two years is to be welcomed but it is possible that, with the recent changes in officer structures and individual officers' duties, there might have been an element of under-recording. The issue will be raised with Service Managers. In common with previous years, the highest numbers of complaints relate to housing or planning issues. This is to be expected because of the nature of the work undertaken by those services.

4. COMPLAINTS TO THE LOCAL GOVERNMENT OR THE HOUSING OMBUDSMAN

- 4.1 The Local Government Ombudsman has sent statistical information of complaints received by him to the Leaders of all principal authorities in England, as well as to the Chairmen of the relevant Scrutiny Committees. The numbers of complaints referred to in the Ombudsman's communication do not match this Council's records – the Ombudsman accepts that differences will occur. Except in exceptional circumstances, the Local Government Ombudsman will not investigate a complaint unless the complainant has exhausted all stages of a Council's complaints procedure. In some (and, it appears, most) cases the Ombudsmen might not inform the Council about a complaint, especially if they consider that no action is required by the Council.
- 4.2 The Ombudsman's statistics refer to nine complaints made to him in 2017/18. The Corporate Complaints Team is aware of only five. Of the complaints made to the Ombudsman, only one was upheld. This related to a delay in the dealing with complaints relating to enforcement action and an apology was given. One local settlement was reached in response to another complaint before consideration by the Ombudsman.
- 4.3 Different criteria apply to complaints to the Housing Ombudsman, but both cases referred to the Housing Ombudsman in 2017/18 had been through the Council's procedures to Stage 3. There were no findings of fault by the Housing Ombudsman.

5. LEARNING FROM COMPLAINTS

- 5.1 It remains important for Services to review each complaint received and, where appropriate, to take action to avoid or to minimise complaints of a similar nature. As part of their initial responses to any complaints received, Service Managers are expected to address any underlying causes that might remove the reason for the complaint.
- 5.2 If complaints are escalated to Stage 2, the Executive Head will examine the reasons for the complaint and, if considered appropriate, ensure that changes in practices are put in place.
- 5.3 When undertaking stage 3 reviews or responding to complaints to an Ombudsman, the Executive Head of Governance & Regulation will discuss the complaint in detail with the relevant Service Manager and/or the appropriate Executive Head, and encourages actions or changes. If the matter is one which appears to affect other services as well, she ensures that those services are involved.

6. CONCLUSIONS

- 6.1 The Council's Complaints Procedure continues to provide a robust system for investigating and resolving complaints. Whilst there has been a very small increase in the number of complaints to the Ombudsman, there does not appear to be any single cause or underlying factor which needs to be addressed.
- 6.2 The Ombudsman has found that the Council was at fault with only one complaint, with a further local settlement being reached between the Council and a complainant before that further complaint was determined by the Ombudsman.

7. RECOMMENDATIONS

- 7.1 That the report be noted;
- 7.2 That Service Managers be encouraged to ensure that employees respond appropriately to customers who appear not to have received an expected standard of service from the Council;
- 7.3 That Service Managers be reminded to review complaints about their services regularly, and to implement any learning from them.

For further information please contact:

Rosemary Rutins
Service Manager, Democratic Services and
Member Support
Tel: 023 8028 5588
e-mail: rosemary.rutins@nfdc.gov.uk

This page is intentionally left blank



COMPLAINTS PROCEDURE

Introduction

The Council's complaints procedure can be used for any type of formal complaint and for any service provided by this Council.

*Please note there is a **separate** complaints procedure regarding Councillors.*

Complaints against elected members can be submitted to this Council's Monitoring Officer. Please see link to website for guidance

<http://www.newforest.gov.uk/index.cfm?articleid=1649> or contact the Monitoring Officer 023 8028 5588.

Aim

Our aim is to swiftly investigate all corporate complaints with impartiality, finding solutions locally whenever possible to the satisfaction of both complainant and the Council. Remember, a quick phone call may be quite effective in settling your concerns. Do not worry if you do not know exactly who to speak to – a telephone call to 023 8028 5000 or a look at our information on the website www.newforest.gov.uk will help put you in touch with the right person.

Responsibility

The Executive Head of Governance & Regulation is responsible for the complaints procedure on behalf of the Chief Executive.

What is a complaint?

A complaint is “an expression of dissatisfaction about the conduct, standard of service, actions or lack of action by the New Forest District Council or its staff”.

In some cases complaints received will be minor day-to-day concerns which will amount to service enquiries or representations rather than formal complaints and can be addressed informally by the service provider. The complaints procedure is not intended for cases where the Council has taken a decision in a proper manner or for an explanation of a decision.

There are certain types of complaints that we cannot investigate. These might include:

- Anonymous complaints
- Cases where other rights of appeal exist (e.g. against refusal of planning permission or housing benefit assessment)
- Routine requests for service (e.g. noisy neighbours, barking dogs), unless such a request has been dealt with improperly or with undue delay
- Cases where an immediate response can be given (e.g. where uncollected refuse is picked up quickly after notification).
- Cases where the Council has started legal proceedings or has taken court action. Or for example, when a debt is owing to the Council.

There are times when a 'complaint' is not a complaint, for example, if the Council is informed that a rubbish bag has not been collected, this will be recorded as a 'service request'. However, if this has not been attended to within a reasonable time and gives the customer, resident or visitor cause to contact the Council again, then this will become a complaint.

Key principles

All complaints will be investigated in accordance with the following principles:

- We will **acknowledge** the complaint within **5 working days** and inform the complainant that it will be looked into. We will give the name of an employee to whom further enquiries can be made.
- We aim to inform the complainant of the **result** of the investigation within **15 working days** (after acknowledgement) and if this is not possible we will advise the complainant.
- When responding we will advise the complainant of who they can appeal to if they remain dissatisfied.
- We will keep the complainant informed. If an unavoidable delay occurs we will notify the complainant
- We will record the complaint. This record includes:
 - Full name and address of complainant
 - Details of the complaint including relevant dates
 - Action taken
 - Employee dealing with the complaint
- We will keep all information confidential particularly names and address that can identify a complainant, site or complaint. However, we may be obliged to disclose some information under certain statutory provisions.

How we deal with complaints

The Council operates a 3-stage complaint process which reflects the practice adopted by many local authorities and is recommended by the Local Government Ombudsman. Following the completion of each stage the complainant will have the right to request that the complaint is escalated to the next stage of the process. This procedure is designed to support the effective management of complaints.

Level	Type of Complaint	Responsible Officer
1	A complaint is sent to the supervisor or Service Manager of the service. They are responsible for ensuring that the complaint is acknowledged, recorded and looked into thoroughly. The response will inform the complainant that if he or she is not satisfied with the outcome of the complaint he or she may appeal to the Executive Head.	Supervisor / Service Manager
2	Second or more serious complaint. Each Executive Head will consider complaints against his or her service where the complainant has appealed from Level 1 and in circumstances where the Executive Head wishes to deal with personally. In the reply the Executive Head will inform the complainant that if the outcome is not satisfactory, an appeal can be made to the Executive Head of Governance & Regulation on behalf of the Chief Executive.	Executive Head
3	Complaints where a complainant is dissatisfied with the review carried out by an Executive Head. The reply will inform the complainant that if he or she is not satisfied with the outcome, a request for a review may be made to the Local Government Ombudsman. OR If the complainant is a Council tenant complaining about the Council as their landlord, the reply will set out the process to be followed to refer the complaint to the Housing Ombudsman Service.	Executive Head of Governance & Regulation on behalf of the Chief Executive

Putting things right

Every effort will be made to resolve complaints without undue delay. The complaints procedure is designed to put things right if something has not been done correctly, and if that's not possible, we will explain why.

The Role of the Council's Chief Executive

The final stage of the Council's Complaints Procedure is dealt with by the Executive Head of Governance & Regulation on behalf of the Chief Executive.

At this stage, the Executive Head of Governance & Regulation ensures that the Chief Executive is aware of the complaint and the response to it. At any stage, the Chief Executive may personally deal with any complaint using whatever procedure he considers appropriate.

Still not satisfied?

If you remain dissatisfied after you have completed the Council's Complaints Procedure, you can contact The Local Government Ombudsman which acts as a watchdog for local government issues.

The Local Government Ombudsman
PO Box 4771
Coventry CV4 0EH
Telephone 0300 061 0614
Website: <http://www.lgo.org.uk/>

OR

If you are a Council tenant and your complaint is against the Council as your landlord, you have the right to ask for your complaint to be considered by the Housing Ombudsman Service. The Housing Ombudsman Service is an independent body set up to provide a free and fair way of dealing with complaints against housing organisations.

However, if you wish to refer your complaint to the Housing Ombudsman Service straight away you will need to contact a "designated person" who may refer the matter on your behalf. In relation to New Forest District Council housing complaints, a "designated person" is a Member of Parliament or any New Forest District Councillor. New Forest District Councillors who have been trained on this process are members of the Council's Community Overview and Scrutiny Panel whose contact details can be found at http://www.newforest.gov.uk/template/newf_cllrs/cteadds.cfm?cn=39.

If you do not want your complaint to be considered by a designated person you may contact the Housing Ombudsman Service yourself, but you may only do this after 8 weeks have elapsed following receipt of the level three review letter in accordance with this procedure.

Housing Ombudsman Service
81 Aldwych
London
WC2B 4HN
Telephone: 0300 111 3000
Website: <http://www.housing-ombudsman.org.uk/>
Email: info@housing-ombudsman.org.uk

Persistent or Unreasonable Complainants

In a minority of cases people can pursue their complaints in a way which impedes looking into a complaint, has significant resource issues for the Council or is unreasonable. This Council defines persistent or unreasonable complainants as “those complainants who, because of the frequency or nature of their contacts with the Council, unreasonably hinder the work of the Council”.

It is important to differentiate between complainants who pursue their complaints with vigour and those who act unreasonably.

Examples of what could be defined as persistent or unreasonable are:

- Refusing to specify the complaint despite offers by the Council to help;
- Refusing to co-operate with the investigation while expecting the complaint to be resolved;
- Refusing to accept the complaint cannot be resolved by the complaints procedure despite being provided with information on this;
- Making groundless complaints about employees and demanding they are replaced;
- Adopting a ‘scattergun’ approach i.e. either submitting a complaint to a number of different people at the Council (such as the service involved, the Information Compliance & Complaints Officer, Chief Executive, Leader, or Chairman) or pursuing a complaint with the Council while asking others (MPs, Local Government Ombudsman, Police, Courts etc.) to do the same;
- Making excessive demands on the time and resources of employees – specifically pursuing a campaign against the Council and phoning or emailing frequently, or consistently writing letters;
- Recording conversations with officers without prior knowledge of those present;
- Submitting repeat complaints on the same topic after the complaints process has been completed insisting there are ‘new’ complaints;
- Refusing to accept the decision – repeatedly arguing the point and complaining about the decision.
- Pursuing unreasonable complaints that provide no, or inadequate, details to substantiate the allegation of wrong-doing/error on the part of the Council.

All complaints will be considered thoroughly and fully. However if a complainant is felt to be acting unreasonably the employee should seek confirmation from the Executive Head of Governance & Regulation that the complainant can be regarded as persistent or unreasonable in accordance with this policy. The following procedure will then be followed.

Where a complaint has been dealt with:

- The Executive Head of Governance & Regulation will write to the complainant explaining why the decision has been taken and stating no further correspondence will be undertaken on the complaint or the issues they have raised. All correspondence received will be read and placed on file.
- Additionally, the Executive Head of Governance & Regulation may take any additional or further necessary action to prevent the unnecessary misuse of public resources on the part of the persistent complainant.
- A copy of this procedure is to be enclosed.

- The right of appeal to the Local Government Ombudsman will be included in the letter.

Where the investigation is ongoing:

The Executive Head of Governance & Regulation will write to the complainant explaining why the decision has been taken and either:

- Stating all future contact whether by phone, fax, email, letter etc. will be directed to the Executive Head of Governance & Regulation (or appropriate nominated officer) only; or
- Explaining that contact with officers will be limited to once a week or other appropriate timescale; or
- Requiring any personal contacts to be in the presence of named witness(es); or
- Stating no further complaints on the same matter will be registered until the present complaint has been determined; or
- Stating the investigation has been terminated and referred to the Local Government Ombudsman

The above list is not exhaustive and decisions will be made on the appropriate way forward by the Executive Head of Governance & Regulation.

Any restrictions imposed under the above procedures will be kept under review (at least every 6 months) and be removed if the need for them no longer exists.

For those who are repeatedly deemed to be a 'persistent or unreasonable complainant' over a long period of time, the review period will be every 9 months.

How to complain – Key Contacts

You can contact us:-

By email: complaints@nfdc.gov.uk

On our website: www.newforest.gov.uk/complaints

By phone: on 023 8028 5000 (if you don't know who to speak to) or 023 8028 5588 and ask for the Information Compliance & Complaints Officer

By writing: Information Compliance & Complaints Officer, New Forest District Council, Appletree Court, Beaulieu Road, Lyndhurst, SO43 7PA

Alternative Formats: The Council can provide information in any format such as on CD, Cassette, tape, Braille, or in any language other than English. You can request this by calling the Information Compliance & Complaints Officer on 023 8028 5588 or by emailing complaints@nfdc.gov.uk

This page is intentionally left blank

NUMBER OF COMPLAINTS BY SERVICE AREA 2017/18

Service	Total complaints received (Level 1)	Proceeding above level 1	Progressed no further than level 2	Progressed no further than level 3	Ombudsman
Housing	18	4	1	1	2
Planning (Development Control/Enforcement)	12	5	2	2	1
Health & Leisure	9	1	1		
Tax and Benefits	6	1			1
Parking	6	1	1		
Waste and Recycling	4	2		2	
Planning (Policy)	3	1		1	
Licensing	2	0			
Environment and Regulation	1	0			
Trees	1	0			
Democratic Services	1	0			
Legal	1	1			1
Street scene	1	1		1	
ICT Services	1	0			
Total	66	17	5	7	5

NUMBER OF COMPLAINTS BY SERVICE AREA 2016/17

Housing	19
Planning	16
Leisure	14
Tax & Benefits	5
Parking	2
Cemeteries	2
Waste & Recycling	2
Street Scene	2
Coast Protection	1
ICT (address management)	1
Dem Services (elections)	1
	65

This page is intentionally left blank

(Total complaints received by the Council = 66)

Service	Ombudsman	Details	Ombudsman's Decision
Housing/Noise	2	1) Effect of actions of building work on housing estate 2) Actions of neighbour, removal of tree; officer conduct; handing of Right to Buy application agreement	Complaint withdrawn as tenant was moved to alternative accommodation No maladministration.
Planning	1	Failure to re-open take enforcement action; failure to follow Council's complaints procedure	Upheld in part. Apology given
Tax & Benefits	1	Delay in decision on housing benefit application; refusal to take complaint about Council Tax to Stage 2 of the Council's complaints procedure	Matter settled before determination by Ombudsman. No action taken.
Legal	1	Alleged delay in dealing with complaint about boundary	Declined to investigate.
Total	5		

Complaints to Ombudsman 2016/17

Housing	3	1) Complaint about neighbour's actions 2) Delay in including applicant in housing register and incorrect advice 3) Anti-social behaviour issues	Not investigated Apology No action after investigation
Planning	1	Way planning decision made	No action after investigation

NUMBER OF COMPLAINTS CONSIDERED JUSTIFIED LOCALLY AND LOCAL FINANCIAL SETTLEMENTS - 2017/18

Service	Justified – with apology and possible settlement	Justified – in part	Number of Financial settlements
Housing	4	4	3
Planning – Development Control and Enforcement	2	1	0
Health & Leisure	5	4	1
Tax and Benefits	3	0	1
Parking	0	0	0
Waste and Recycling	3	0	1
Planning - Policy	0	0	0
Licensing	0	2	0
Environment and Regulation	0	0	0
Trees	0	0	0
Democratic Services	0	0	0
Legal	0	0	0
Street scene	0	1	0
ICT Services	0	0	0
Total	17	12	6

This page is intentionally left blank

CORPORATE OVERVIEW & SCRUTINY PANEL – 27 September 2018

FILM:NEW FOREST REVIEW

1. INTRODUCTION

- 1.1 The purpose of the report is to provide an update on the progress of the Film: New Forest Project and to look forward as to the future development.

2. BACKGROUND

- 2.1 In 2016, the District Council launched the 'Film: New Forest' project with the primary objective of creating film and television related spend in the local economy. A large production film can generate up to £40,000 per day for the economy through spend on local goods and services. This is a form of inward investment which provides employment for local freelance crew as well as boosting spend in local business and their associated supply chains.
- 2.2 The Film: New Forest project is being delivered in partnership with Creative England. Through this partnership, Film: New Forest has been successful in securing a wide range of productions including film, documentaries and commercials. Each of these has provided valuable income into the local economy.
- 2.3 Secondary objectives of the Film: New Forest project seek to boost visitor related spend through screen tourism and to provide young people in particular with opportunities to work in the film and television industry by working alongside colleges and universities with specialities in this area.

3. ACHIEVEMENTS TO DATE

- 3.1 Since the project launch, we have hosted a number of events to promote Film: New Forest. These events have ranged from finding out more about being a filming location, local crew networking evenings and more recently an educational event for local students.
- 3.2 Included in our Creative England partnership agreement was the production of a promotional film highlighting the New Forest as a filming location. The film, narrated by Mark Kermode was successfully launched on 28th February along with a new dedicated website. The promotional video can be viewed on the website: filmnewforest.com/about-film-new-forest/promo-video/
- 3.3 The website has been a key factor in raising the profile of the Film: New Forest project especially with location scouts. A simple "filming New Forest" Google search generates filmnewforest.com as the top result.
- 3.4 The functionality of the website allows New Forest businesses and residents to either register their property as a filming location or their professional service which grows our databases and profile as a filming location. This works to achieve our secondary objectives.
- 3.5 Film: New Forest has joined Film Offices UK (FO:UK) which has opened up a network of other local authority film offices to enable us to learn from established offices such as Liverpool, Manchester and Bristol.

- 3.6 So far this year we have received over 80 separate filming enquiries and 2018 alone has seen over £150k injected into the New Forest economy. Most recently the New Forest has featured in 'Unforgotten series 3' and in the Channel 4 documentary 'A Year in the New Forest'. Overall, filming projects since Film: New Forest was established in 2016 have injected over £1.55 million into our economy.
- 3.7 A steering group has been formed for the project which consists of key players who deal with filming requests. Whilst Film: New Forest is now the main portal to receive new filming enquiries, often is the case other interested parties may be required to become involved. The steering group has representatives from the New Forest National Park Authority, Forestry Commission, local colleges and from local businesses. This group is invaluable for the project as any issues that arise can be addressed and solved collectively.
- 3.8 Film: New Forest prominently featured on the third day on the NFDC stand at the New Forest Show. We hosted a mini-cinema where the promotional film along with past filming trailers were shown, a life size storm trooper which acted as a great conversation starter to make visitors aware of not only the variety of productions that had taken place but also the economic benefits that come with them.
- 3.9 New Forest District Council received Highly Commended in the FSB Wessex Regional Local Authority Small Business Friendly Awards 2018 in recognition of Film: New Forest in the Most Innovative 'Small Business Friendly' Programme, Campaign or Project.

4. FUTURE WORK PROGRAMME

4.1 FILM FESTIVAL: NEW FOREST

At the New Forest Show, Cllr Harris officially launched the 2019 Film Festival which will be held from the 8th to 16th June 2019 deliberately running over two weekends. The festival will celebrate films with a New Forest connection, celebrate local talent and generate an economic boost to the local economy all of which tie in with the aims of the Economic Development Strategy 2018-2023.

4.2 OTHER EVENTS

Within the partnership agreement in place with Creative England we will be running two events; locations will be the focus in autumn whereby we will be inviting local businesses and residents to come and find out what it is really like being a 'filming location' with the aim to increase our database and in spring we will host another educational event involving the two local colleges. Both events will be immediately followed by local crew networking sessions which have been previously well attended.

- 4.3 Officers have now made significant progress with local industry bodies and will also look to host question and answer sessions with local directors and location scouts as well as look to host film maker meet financier type of events.

- 4.4 In collaboration with FO:UK, Film: New Forest will be exhibiting at FOCUS on 4/5 December in London. FOCUS is an international exhibition aimed at all the creative screen industries – including film, TV, advertising, animation and interactive – and is the only UK trade event where attendees can meet with content makers, film commissions, production services and locations providers from over 60 countries. This will further raise the profile of New Forest as a filming destination. More information can be viewed at www.tlgfocus.com.

5. FINANCIAL IMPLICATIONS

5.1 None of note with the exception of budget which is being absorbed within Economic Development Initiatives budget.

6. CRIME & DISORDER IMPLICATIONS

6.1 There are none.

7. ENVIRONMENTAL IMPLICATIONS

7.1 There are none.

8. EQUALITY & DIVERSITY IMPLICATIONS

8.1 There are none.

9. DATA PROTECTION IMPLICATIONS

(consider Privacy Impact Assessment, Privacy Notice)

9.1 There are none

10. RECOMMENDATIONS

10.1 That it be recommend that Members note the content of this report and offer any suggestions for future programme development.

For further information contact:

Natasha Davies
Business Support Officer
023 8028 5588
natasha.davies@nfdc.gov.uk

Background Papers:

**Published Document: Economic
Development Strategy 2018-2023**

This page is intentionally left blank

**CORPORATE OVERVIEW AND SCRUTINY PANEL – 27 SEPTEMBER 2018
WORK PROGRAMME 2018/19**

ITEM	TIMING	LEAD OFFICER
Property Investment Strategy Update	Special Meeting 22 November 2018	Andrew Smith/Alan Bethune
Broadband in the New Forest – update on progress with provision	Special meeting 22 November 2018	Matt Callaghan
Budget T&F Report	Special meeting 22 November 2018	Andy Rogers/Alan Bethune
Accommodation Strategy	24 January 2018	TBC

TASK AND FINISH GROUPS				
ITEM	OBJECTIVE	METHOD	TIMING	LEAD OFFICER
Budget Task and Finish Group	To review the Council's future budget strategy	Task and Finish Group	To receive updates at the June 2018 meeting, on progress with the Group's recommendations which were submitted at January 2018 Panel meeting	Andy Rogers/ Alan Bethune/ Rebecca Drummond

NOT YET TIMETABLED

ITEM	OBJECTIVE	METHOD	TIMING	LEAD OFFICER
Employee Owned Services (John Lewis Model)	Terms of Reference to be agreed	Task and Finish Group	Initiate at June 2019 panel	
“Regions” Continue engagement/ collaboration with HCC/LEPS or any other external public agency, including reference to the Hampshire-wide devolution proposal	To effectively facilitate good relationships with these agencies in order to produce beneficial outcomes in the District	Report documenting progress with LEPs and business portal HCC element via Leader updates	TBC	TBC
Devolution – Wider Hampshire	Monitor progress with regard to devolution	Regular update from Leader	At appropriate times	TBC
Universal Credit update	To be aware of issues arising	Regular update from Finance & Efficiency Portfolio Holder	At appropriate times	TBC
Portfolio Holders’ Updates (Standing Item) Updates from Task and Finish Groups				
Access to alternative funding sources for voluntary organisations and Parish/Town Councils	To explore opportunities, eg crowd funding, following funding reductions	Officer written report	To be confirmed	TBC