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Meeting	CORPORATE SCRUTINY COMMITTEE
Time/Day/Date	6.30 pm on Thursday, 19 June 2025
Location	Abbey Room, Stenson House, London Road, Coalville, LE67 3FN
Officer to contact	Democratic Services (01530 454512)

AGENDA

Item	Pages
1. APOLOGIES FOR ABSENCE	
2. DECLARATION OF INTERESTS	
Under the Code of Conduct members are reminded that in declaring interests you should make clear the nature of that interest and whether it is a disclosable pecuniary interest, registerable interest or other interest.	
3. PUBLIC QUESTION AND ANSWER SESSION	
To receive questions from members of the public under rule no.10 of the Council Procedure Rules. The procedure rule provides that members of the public may ask any question on any matter in relation to which the Council has powers or duties which affect the District, provided that three clear days' notice in writing has been given to the Head of Legal and Support Services.	
4. MINUTES	
To approve and sign the minutes of the meeting held on 13 March 2025.	3 - 6
5. COUNCIL DELIVERY PLAN - PERFORMANCE REPORT - QUARTER 4 2024/25	
Report of the Head of Human Resources and Organisational Development	7 - 36
6. 2024/25 Q3 GENERAL FUND FINANCE UPDATE	
Report of the Head of Finance	37 - 78
7. CUSTOMER SERVICES ANNUAL REPORT	
Report of the Strategic Director of Resources	79 - 90

8.	CORPORATE COMPLAINTS AND FEEDBACK ANNUAL REPORT	
	Report of the Strategic Director of Resources	91 - 156
9.	PEER REVIEW FEEDBACK FOLLOW UP	
	Report of the Chief Executive	157 - 178
10.	SCRUTINY ANNUAL REPORT	
	Report of the Strategic Director of Communities	179 - 196
11.	ITEMS FOR INCLUSION IN THE FUTURE WORK PROGRAMME	
	To consider any items to be included in the work programme. The plan of forthcoming Cabinet decisions and the current work programme are attached for information.	197 - 218

Circulation:

Councillor S Lambeth (Chair)
 Councillor M Ball (Deputy Chair)
 Councillor C Beck
 Councillor D Bigby
 Councillor M Burke
 Councillor K Horn
 Councillor A Morley
 Councillor R L Morris
 Councillor S Sheahan
 Councillor J Windram

MINUTES of a meeting of the CORPORATE SCRUTINY COMMITTEE held in the Forest Room, Stenson House, London Road, Coalville, LE67 3FN on THURSDAY, 13 MARCH 2025

Councillors M Ball, C Beck, M Blair-Park, M Burke, J Legrys (Substitute for Councillor A Morley), S Sheahan and J Windram

Portfolio Holders: Councillor A Woodman

Officers: Mrs A Crouch, Mrs R Wallace, Mr P Stone, Ms J McGarry, Ms M Hodgett and Mr M Murphy

35. APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillors K Horn, A Morley and R Morris.

36. DECLARATION OF INTERESTS

There were no declarations of interest.

37. PUBLIC QUESTION AND ANSWER SESSION

There were no questions received.

38. MINUTES

Consideration was given to the minutes of the meeting held on 7 January 2025.

It was moved by Councillor M Ball, seconded by Councillor M Blair-Park and

RESOLVED THAT:

The minutes of the meeting held on 7 January 2025 be approved as an accurate record of proceedings.

39. PERFORMANCE MONITORING REPORT

The Chair thanked Mike Murphy, the Head of Human Resources and Organisational Development for his 35 years of service prior to his retirement at the end of March. The Committee wished him well in his retirement.

The Head of Human Resources and Organisational Development presented the report to Members.

A discussion was had on the areas that were not delivering as planned, particularly customer complaints. Requests were made for further information, and questions were asked as to whether anything more could be done to support the service, such as more staff and the provision of training for existing staff. The Strategic Director of Resources explained that the service was well supported with a very dedicated team manager who was working closely with teams throughout the Council to resolve complaints. It was noted that customer standards and contact was currently being reviewed as the Corporate Leadership Team recognised that improvements were required. Members were reminded that the Annual Customer Services Report would be considered at the next meeting which would include the detail Members requested during discussion. The Strategic Director of Communities explained that there had been a 72 percent increase in complaints in

comparison to quarter three in 2023/24 and it was acknowledged that housing repairs was the main subject of complaints. Members were assured that work was being undertaken in the housing service to tackle the issue which the Members on the Housing Improvement Board were being kept updated on.

A discussion was had on the complaints process and the stage that the Ombudsman Service became involved. The Strategic Director of Communities agreed to provide more specific Ombudsman timescales outside of the meeting. It was confirmed that a formal complaint needed to be made by an individual rather than through a Councillor.

Councillors congratulated the Head of Planning and Infrastructure for the improvements made to the planning service since the last performance report.

It was suggested that the method of reporting the key performance indicators under 'a well-run Council' priority needed to be revisited as it could be perceived that the Council was failing due to its contradictory nature. The Strategic Director of Resources explained how the performance in this area was measured in more detail. Comments were noted and it was agreed to present a fairer picture for this council priority moving forward.

A further comment was made on details not included relating to food safety standards for food businesses. It was suggested that a breakdown of the 20 percent of food businesses not achieving a five-star rating be included to provide a full picture.

The report was noted. The Chair thanked Members for their comments which would be reported to Cabinet as part of the performance monitoring process.

40. HOUSING REPAIRS PERFORMANCE ANNUAL UPDATE

The Strategic Director of Communities presented the report to Members.

A discussion was had on the progress made to date to the Housing Repairs Service and in response to a question relating to the amount of time expected to address all the areas needing improvement, it was reported that a likely timescale was 12 to 18 months.

In relation to recruitment issues, a Member suggested that fixed term seasonal contracts be used for certain jobs rather than permanent in-house team, it was felt this may be more successful in a competitive market. The Strategic Director of Communities acknowledged the comments made and confirmed some seasonal work was already carried out in this way.

In relation to the stock survey recently undertaken assessing the condition of all council homes, a Member questioned when a decent standard for 100 percent of stock was expected to be achieved. The Strategic Director of Communities assured members that all work currently required to reach 100 percent was programmed in for the next financial year. Assurances were also given on compliance, particularly gas, electric and asbestos, and Members were assured that all areas below 100 percent had action plans in place.

A discussion was had on trends over a period of time for newly undertaken work, it was agreed for the information reported to the Housing Improvement Board on the subject be shared with the Committee.

The update was noted. The Chair thanked the Members for their comments which would be presented to Cabinet at its meeting on 22 April 2025.

41. PROCUREMENT STRATEGY

The Strategic Director of Resources presented the report to Members.

In response to a question about 'buying local', the Strategic Director of Resources stated that it was an ambition of the Council to buy local wherever possible but there was still lots of work required on contract analysis to be clear on the areas of spend.

At the request of a Member, the Strategic Director of Resources gave an explanation about 'social value considerations' in relation to the procurement strategy moving forward as it was a key element. It was agreed for officers to provide a current example for North West Leicestershire to Members outside of the meeting.

A Member asked for assurances that contractors working with customers and residents with specific needs were compliant with Equality, Diversity and Inclusion, and received the relevant training. The Strategic Director of Communities explained that there was a suite of policies that contractors had to comply with, and reports were regularly received from them, as well as from the in-house repairs staff. The Strategic Director of Communities agreed to look at what EDI training was provided and report back to Members outside of the meeting.

It was suggested that a quarterly update be provided detailing how the services procured were performing against the Council's specification, in relation to achieving key performance indicators. It was felt that this would be an indication as to the suitability and competency of the contractors. The Strategic Director of Resources noted the comments.

The report was noted. The Chair thanked the Members for their comments which would be presented to Cabinet at its meeting on 25 March 2025.

42. 2024/25 QUARTER 2 GENERAL FUND AND HOUSING REVENUE ACCOUNT UPDATE

The Strategic Director of Resources presented the report to Members.

A Member referenced the staff pay award in that it exceeded the amount accounted for in the 2024/25 budget. It was noted that the Committee had recommended that the amount be increased. It was suggested that more consideration be given to the recommendations of the committee. Officers noted the comment.

It was also noted that in relation to the Housing Revenue Account lower operating expenditure, a request was made for more detail in future reports.

It was acknowledged that recruitment and retention was an issue for the Council and Members requested assurances that officers were engaging on the matter nationally, with information coming back to the authority. Members were assured that the new Head of Human Resources and Organisational Development would be addressing the matter and would attend the Committee in due course.

In relation to the Council's reserves, a Member questioned if there was a plan for higher level of spending following a suggestion at the recent Council meeting that it should be used for the benefit of the residents of the District due to the Local Government Reorganisation discussions currently underway. The Strategic Director of Resources confirmed that it would be a consideration as part of the review of the medium-term financial plan during which reserve balances will be looked at and conversations with the relevant stakeholders would be had.

The update was noted. The Chair thanked the Members for their comments which would be presented to Cabinet in due course.

43. ITEMS FOR INCLUSION IN THE FUTURE WORK PROGRAMME

Consideration was given to the future work programme and no comments were made.

The meeting commenced at 6.30 pm

The Chairman closed the meeting at 8.10 pm



NORTH WEST LEICESTERSHIRE DISTRICT COUNCIL

CORPORATE SCRUTINY COMMITTEE –THURSDAY, 19 JUNE 2025

Title of Report	COUNCIL DELIVERY PLAN – PERFORMANCE REPORT – QUARTER 4 2024/25	
Presented by	Hannah Panter Head of Human Resources and Organisation Development	
Background Papers	Council Delivery Plan Council meeting held on 14 November 2023	Public Report: Yes
Financial Implications	No direct financial implications.	
	Signed off by the Section 151 Officer: Yes	
Legal Implications	No direct legal implications arising from this report, however, in accordance with Good Governance, it is important that the performance of the Council's Delivery Plan is reviewed quarterly.	
	Signed off by the Monitoring Officer: Yes	
Staffing and Corporate Implications	The Council Delivery plan sets out the priorities for the Council for a five-year period so has significant corporate and staffing implications.	
	Signed off by the Head of Paid Service: Yes	
Reason Agenda item submitted to Scrutiny Committee.	To report the performance of the Council during the fourth quarter of 2024/25 against the objectives and key performance indicators as detailed in the Council Delivery Plan as agreed by full Council on 14 November 2023. To request that Scrutiny Committee reviews the comments of Cabinet on the performance report and provides feedback on its response for consideration by Cabinet through the next performance Cabinet report.	
Recommendations	THAT CORPORATE SCRUTINY COMMITTEE:	

	<p>1. NOTES THE CONSIDERATION OF THE PERFORMANCE REPORT BY CABINET AT ITS MEETING ON 20 MAY 2025.</p> <p>2. PROVIDES COMMENTS AND FEEDBACK ON CABINET'S RESPONSE TO THE PERFORMANCE ACHIEVED, TO BE FED BACK THROUGH THE NEXT CABINET PERFORMANCE REPORT.</p>
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1.0 BACKGROUND

- 1.1 The Council prepared a Council Delivery Plan during late 2023, and the plan is scheduled to cover the lifetime of the Council administration for the period 2023/24 until a year beyond the next election in May 2027 (to ensure continuity in the aftermath of that election and to allow time for a new plan to be developed). The plan was developed with inputs from the Corporate Scrutiny Committee and the opposition groups and was agreed by Council at its meeting on the 14 November 2023.
- 1.2 The plan will be monitored in relation to the targets and a suite of performance indicators on a quarterly basis in line with the performance management framework. This will involve quarterly reports to Cabinet, the outcomes of the reports will then be shared with the Corporate Scrutiny Committee. Further information on the progress of the set of plans that sit below the Council delivery plan, the directorate plans, are monitored at officer level by the Corporate Leadership Team.
- 1.3 The reporting period for this report runs from January to March 2025.

CONSIDERATION AT CABINET

The below is an extract from the minutes of the Cabinet meeting held on the 20th May 2025 at which the Performance report against the Council Delivery plan for the period of January-March 2025 was considered

The Housing, Property and Customer Services Portfolio Holder presented the report.

He advised in terms of his own area; he noted that two of the tenant satisfaction measures had fallen towards the end of the year but noted that at the start of the current financial year the figures were moving in the right direction. He noted that a great deal of work had been done around the response times to customer complaints and that the Customer Services team was working with other services within the Council to seek to review the customer contact standards and handling complaints.

He then provided an update on behalf of the Finance and Corporate Portfolio Holder. He noted that the Strategic Director of Resources had taken steps to address the completion of the Statement of Accounts for 23/24. He advised members that the Council had made significant progress over the past two years in identifying savings and that the transformation programme continued to explore innovative ways of working and service delivery, which was expected to generate further savings.

The Business and Regeneration Portfolio Holder advised that the services had delivered against the targets.

The Planning Portfolio Holder advised that the targets for planning service were all comfortably above target for the fourth quarter in a row.

The Communities and Climate Change Portfolio Holder advised that there was now a plan in place for moving forward with the change to the recycling system and that the Market footfall had increased. He acknowledged how well attended the event that had been organised by Coalville CAN at Marlborough Square had been on Saturday and that the Love Your Neighbourhood had had a successful first year.

Members were thanked for their comments, which would be presented to Corporate Scrutiny on 19 June 2025.

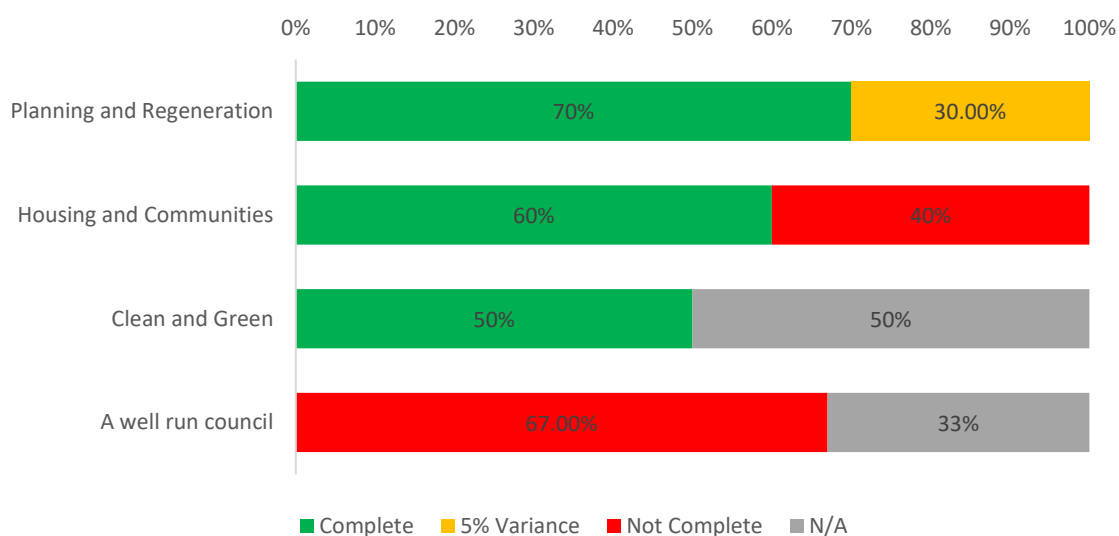
The below paragraphs are extracted directly from the report that was considered by Cabinet on the 20 May 2025. This information has been extracted to assist members of the Corporate Scrutiny Committee in having the summary information to hand when considering the headline performance data. The full report which contains more detail is available at the following link to the Cabinet papers.

[Agenda for Cabinet on Tuesday, 20th May, 2025, 5.00 pm](#)

2.0 PERFORMANCE REPORT

- 2.1 Executive Summary – the Council Delivery Plan contains four key priority areas – notably “A well run Council, Clean and Green, Housing and Communities and Planning and Regeneration”.
- 2.2 The chart below shows the performance in quarter 4 overall against each of the four priority areas.
- 2.3 The chart shows the priorities that have been completed, those that were within a 5% variance of being completed, those that were not completed at all and those that were not applicable (usually due to no data being available, because they are scheduled for completion at a later stage of the plan.)
- 2.4 There are 18 key performance indicators (KPI's) in the Plan. Six relate to Planning and Regeneration, five to Housing and Community Services, four relate to Clean and Green and three relate to a well-run Council.
- 2.5 The chart below shows the performance in quarter 4 overall against each of the four priority areas. The table shows the priorities that have been completed, those that were within a 5% variance of being completed, those that were not completed at all and those that were not applicable (usually due to no data being available, because they are scheduled for completion at a later stage of the plan.)

Our Priorities

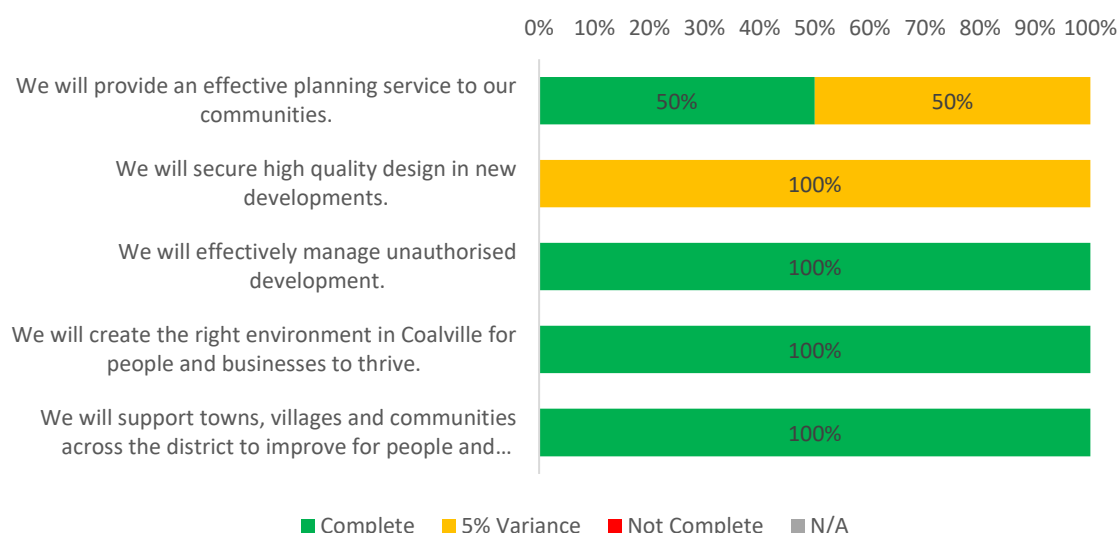


2.6 Of the 18 key performance indicators (KPIs) in the Council Delivery Plan:

- Six relate to Planning and Regeneration. Four have been completed and two are within a 5% variance.
- Five relate to Housing and Communities. Three have been completed and two have not been completed.
- Four KPIs relate to the Clean and Green objective. Two are complete and two are scheduled for completion at a later stage.
- Three relate to a Well-run Council. Two have not been completed and one is scheduled for completion at a later stage.

2.7 The following four charts show the more detailed breakdown of the indicators as they relate to each of the priority areas using the same assessment scale in relation to percentage completed etc. For each of the priority areas more information is provided in the later stages of the report together with detailed commentary on the progress.

Planning and regeneration



Planning and regeneration_ Overview of Performance in Percentage of KPI

As a percentage of applicable KPIs	Complete	5% Variance	Not Complete	N/A
We will provide an effective planning service to our communities. (Split into two sections)	50%	50%		
We will secure high quality design in new developments.		100%		
We will effectively manage unauthorised development.	100%			
We will create the right environment in Coalville for people and businesses to thrive.	100%			
We will support towns, villages and communities across the district to improve for people and businesses.	100%			

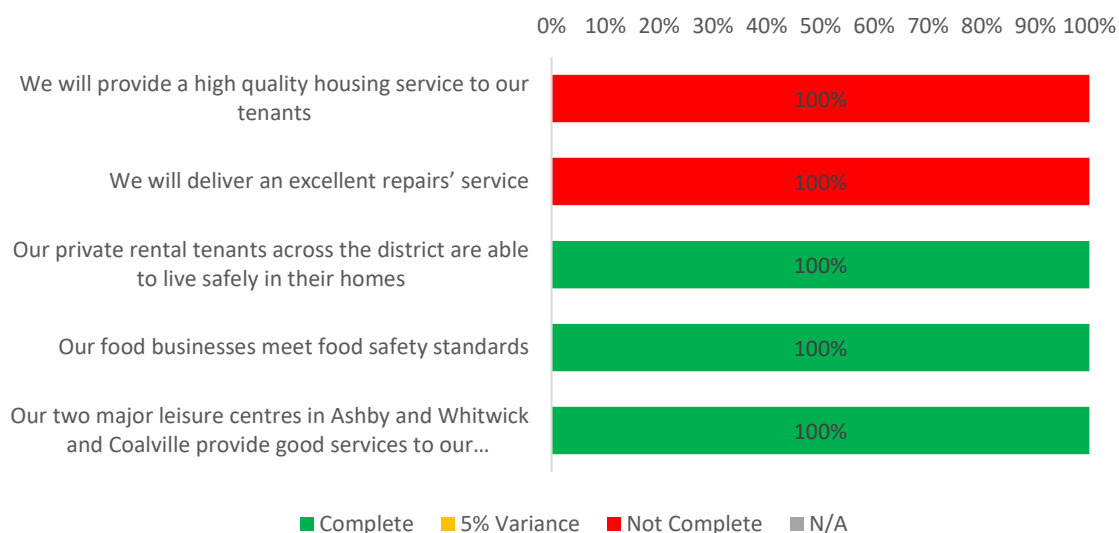
Planning and regeneration_ Overview of Performance in KPI numbers

As a number of applicable KPIs/KPI sections	Complete	5% Variance	Not Complete	N/A
We will provide an effective planning service to our communities. (Split Across 2 KPIs 1. Adoption of a local plan by 2026 and 2. Timely determination of planning applications- Major, Minor and other)	0.5	0.5		
We will secure high quality design in new developments.		1		
We will effectively manage unauthorised development.	1			
We will create the right environment in Coalville for people and businesses to thrive.	1			

We will support towns, villages and communities across the district to improve for people and businesses.

1

Housing and Communities



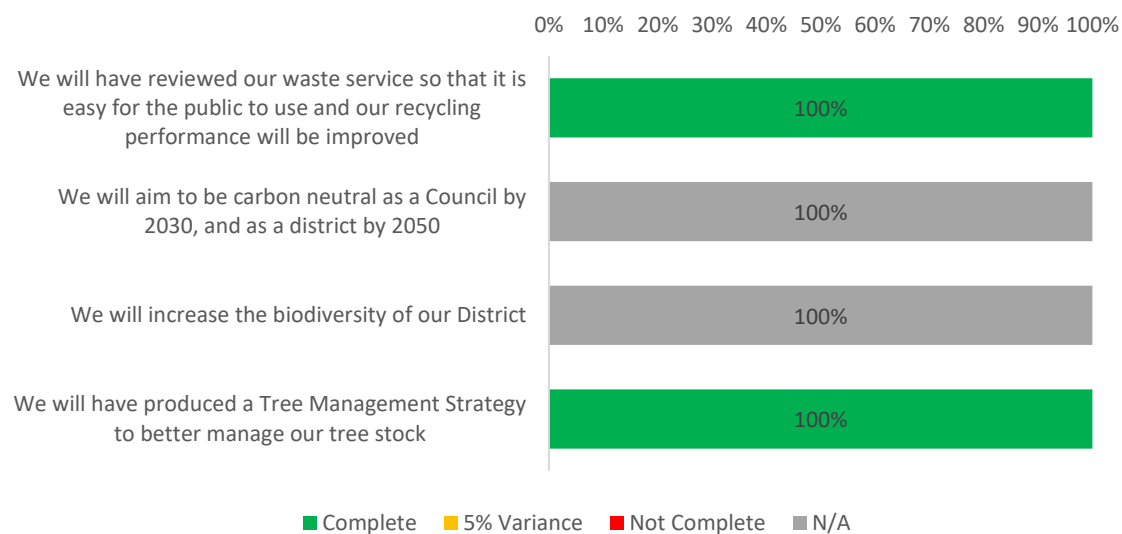
Housing and Communities- overview of Performance in Percentages of KPIs

As a percentage of applicable KPIs	Complete	5% Variance	Not Complete	N/A
We will provide a high quality housing service to our tenants			100%	
We will deliver an excellent repairs' service			100%	
Our private rental tenants across the district are able to live safely in their homes	100%			
Our food businesses meet food safety standards	100%			
Our two major leisure centres in Ashby and Whitwick and Coalville provide good services to our communities	100%			

Housing and Communities- overview of Performance in KPI numbers

As a number of applicable KPIs/KPI sections	Complete	5% Variance	Not Complete	N/A
We will provide a high quality housing service to our tenants			1	
We will deliver an excellent repairs' service			1	
Our private rental tenants across the district are able to live safely in their homes (This KPI is split across two distinct Services- Private Landlord compliance with MEES standards which is dealt with Environmental protection Team and Private Landlord's charter which is dealt with by Housing)	1			
Our food businesses meet food safety standards	1			
Our two major leisure centres in Ashby and Whitwick and Coalville provide good services to our communities	1			

Clean and Green



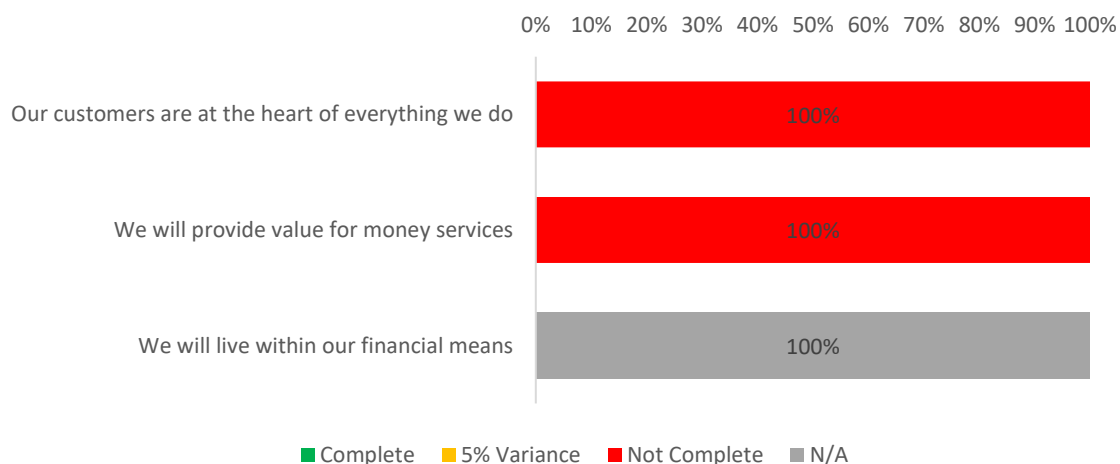
Clean and Green- overview of Performance in Percentages of KPIs

As a percentage of applicable KPIs	Complete	5% Variance	Not Complete	N/A
We will have reviewed our waste service so that it is easy for the public to use and our recycling performance will be improved	100%			
We will aim to be carbon neutral as a Council by 2030, and as a district by 2050				100%
We will increase the biodiversity of our District				100%
We will have produced a Tree Management Strategy to better manage our tree stock	100%			

Clean and Green- overview of Performance in number of KPIs

As a number of applicable KPIs/KPI sections	Complete	5% Variance	Not Complete	N/A
We will have reviewed our waste service so that it is easy for the public to use and our recycling performance will be improved	1			
We will aim to be carbon neutral as a Council by 2030, and as a district by 2050				1
We will increase the biodiversity of our District				1
We will have produced a Tree Management Strategy to better manage our tree stock	1			

A well run Council



Well Run Council- overview of Performance in Percentages of KPIs

As a percentage of applicable KPIs	Complete	5% Variance	Not Complete	N/A
Our customers are at the heart of everything we do			100%	
We will provide value for money services			100%	
We will live within our financial means				100%

Well Run Council- overview of Performance in numbers of KPIs

As a number of applicable KPIs/KPI sections	Complete	5% Variance	Not Complete	N/A
Our customers are at the heart of everything we do			1	
We will provide value for money services			1	
We will live within our financial means				1

Key Progress Areas for the Quarter:

- **Timely Planning Application Determination:** All three targets for this period were comfortably exceeded for the fourth consecutive quarter.
- **District Wide Regeneration Framework:** The framework has been adopted and there has been successful delivery of several projects, including the Kegworth Market Place Public Realm, Visitor Economy Action Plan (Taste The Place and Sustainable Tourism Schemes), National Forest Masterplan projects, and the (Pilot) Ambassadors Scheme. Additionally, £720,000 from the UKSPF grant has been invested in community-based projects across the district.
- **MEES Policy Compliance:** 100% of landlords were contacted within the specified timeframe, resulting in a significant improvement in compliance, reducing non-compliant properties from 118 in September 2023 to just seven in Quarter 4 of 2024/25.
- **Customer Complaint response times-** Significant progress in terms of complaint response times over the last quarter (from 58% overall in Quarter 3 to 74% in Quarter 4), narrowly missing out on an Amber RAG rating.

Although complaints narrowly missed the target for the quarter, there was a significant improvement compared to Quarter 2. The Customer Services Team is actively collaborating with various services to ensure complaints are addressed promptly. This includes forming working groups to review customer contact standards and holding dedicated sessions with specific services to better understand the customer journey.

- **Financial Management:** While the Council faces a medium-term funding gap, it is actively exploring options through its budget process and transformation programme to close this gap. The Council successfully set balanced budgets for both 2024/25 and 2025/26, with significant efforts to identify savings in each year.

The Council is working closely with external auditors to ensure the timely completion of the Statement of Accounts, despite ongoing issues with the new finance system. On 23 April 2025, the Director of Resources provided a detailed response to the Audit and Governance Committee, outlining the actions being taken to address these challenges.

Despite these issues, the Council's financial management is improving. For instance, the Council has partnered with V4 to ensure its procurement processes comply with the Procurement Act 2023. Earlier this year, the Council updated its contract procedure rules to align with the new regulations, and a Procurement Strategy was approved in March 2025.

The Council has also reviewed its financial monitoring activities, ensuring that reports presented to Cabinet are transparent and involve key stakeholders to monitor budgets and take appropriate actions when necessary.


The Council reports its financial position to key stakeholders, and its treasury management arrangements are robust. Recent benchmarking shows excellent returns on investment compared to other district councils. Capital governance arrangements, implemented over two years ago, continue to be monitored by the Capital Strategy Group.

- **Governance:** The Council continues to ensure its Governance arrangements are robust. The Director of Resources and the Head of Legal and Support Services, together with the Leisure Services Team Manager recorded an 'in conversation' video answering a range of questions in respect of decision-making across the Council. The Local Government Association views the Council as an exemplar in governance arrangements, with a dedicated focus on governance training across the organisation. There is ongoing work to ensure officers understand the decision-making processes in place. Governance training is conducted regularly, with an annual programme delivered over the past two years.

Areas Requiring Improvement and Remedial Actions:


- **Tenant Satisfaction:** There has been a decline in tenant satisfaction levels from the previous quarter, primarily due to issues with repair services. A recovery programme is underway and has been reported to both the Cabinet and Scrutiny Committee.
- **Outstanding Statement of Accounts for 2023/24:** Efforts are ongoing to address this issue in collaboration with external auditors. Work is also being done to resolve historic issues with Unit 4, the Council's finance system, and additional resources have been procured to facilitate the closure of the 2023/24 accounts. The Director of Resources provided a detailed update to the Audit and Governance Committee on 23 April 2025 outlining the actions being taken.
- **Funding Gap:** The Council has developed a programme to address the funding gap over the medium term. Preparations will begin in Spring 2025 to support budget setting for the 2026/27 financial year, focusing on identifying additional savings or income. A balanced budget for 2025/26 has been approved.

Policies and other considerations, as appropriate	
Council Priorities:	<p>This report measures progress against all of the Council's priorities.</p> <p>Planning and regeneration Communities and housing Clean, green and Zero Carbon A well-run council</p>
Policy Considerations:	Council Delivery Plan
Safeguarding:	No direct considerations.
Equalities/Diversity:	No direct considerations, the plan impacts across all of the Council's communities.
Customer Impact:	No direct considerations.
Economic and Social Impact:	As detailed in the report.
Environment, Climate Change and zero carbon:	As detailed in the report.
Consultation/Community Engagement:	No direct considerations.
Risks:	Detailed in the Corporate risk register
Officer Contact	<p>Hannah Panter Head of Human Resources and Organisation Development. Hannah.Panter@nwleicestershire.gov.uk</p> <p>Allison Thomas Chief Executive Allison.Thomas@nwleicestershire.gov.uk</p>

Priority	KPI reference	Key Aim	Q4 Progress	Target	Commentary	Head of Service	RAG rating
 Planning and regeneration	1	We will adopt a local plan by 2026		2023-4 Submit local plan (Reg 18 consultation). 2024/5 Pre-submission consultation (Reg 19) Submission of local plan and examination.	New Local development Scheme published. Housing allocations for the wider district (not including the previously agreed greater Coalville allocations) were agreed at Local Plan Committee on 11 March. Consultation taking place until 2 May 2025 in respect of potential additional housing and employment sites.	Head of Planning and Infrastructure	
	2	We will deal with your planning applications for major, minor and other developments by consistently meeting and exceeding the government's targets of 60%, 65% and 80% respectively.	88.89% 80.49% 86.96%	Major- At least 60% of applications determined within 13 weeks. Minor- At least 65% of applications determined within 8 weeks. Other- At least 80% of applications determined within 8 weeks.	The team has comfortably exceeded all three of the set targets for this period for the fourth quarter running. Cumulatively for all quarters 24/25: Majors = 86.54% Minors = 83.54% Others = 89.27%	Head of Planning and Infrastructure	


	3	<u>We will have developed a new local design guide and new developments will comply with it.</u>		<p>2023-4 Develop a new Design Guide for North West Leicestershire adopting current best practice in accordance with the Governments National design guide.</p> <p>Undertake public consultation on the new Design Guide for North West Leicestershire.</p> <p>2024/5 Adopt the new design guide for North West Leicestershire.</p> <p>New development complies with the requirements of the adopted design guide.</p>	<p>Public Consultation is now anticipated in Q1, 25/26. Proposing to take the Good Design Guide to Local Plan Committee in May 2025 to agree consultation and then Cabinet and Local Plan Committee for adoption in Q3 25/26.</p>	Head of Planning and Infrastructure	
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	4	<u>We will effectively manage unauthorised development.</u>		<p>Work begins in 2024/5 Adopt a new local enforcement plan by the end of Q2 24/25</p> <p>Monitor and measure response times against the targets set out in the adopted Local Enforcement Plan and report biannually to Planning Committee in Q3 and 4 24/25</p>	<p>New Local Enforcement Plan adopted at Cabinet on 22 October 2024.</p> <p>Monitoring will now be reported to Committee in Q1 25/26 and then once every six months after that.</p>	Head of Planning and Infrastructure	
	5	<u>We will have delivered our ambitious Coalville Regeneration Framework.</u>		Quarterly progress statement plus an additional Annual Framework review in Q4	Progress continues to be made on implementing those projects where the Council has identified it will take the lead role. A review of the framework has been undertaken and a “refreshed” document has been drafted.	Head Of Property and Regeneration	
	6	<u>We will have developed a regeneration framework and will be on the way to supporting thriving towns, villages and communities across the district.</u>		Work begins in Q4 with the production of the NWL Regeneration Framework	Members have adopted a District Wide Regeneration Framework for NWL. From that Framework the following projects have now been delivered: Kegworth Market Place Public Realm, Visitor Economy Action Plan (Taste The Place and Sustainable	Head Of Property and Regeneration	

					Tourism Schemes), National Forest Masterplan projects, and the (Pilot) Ambassadors Scheme. The Council has also invested £720,000 of UKSPF grant into Community based projects across the district. A Refresh of the Framework has also commenced to be informed by Vital And Viable studies		
 Housing and Communities	7	We will provide a high quality housing service to our tenants.		2023/4 First data publication	55% resident Satisfaction level This has dropped since last year driven by the results of the repairs measures; however, other measures have increased. A recovery plan for repairs service as a whole is in train and has been reported to Scrutiny and Cabinet.	Head of Housing	
	8	We will deliver an excellent repairs' service.		2023/4 First data publication	56% Satisfaction level This has dropped since last year driven by the results of the repairs measures; however, other measures have increased. A recovery plan for repairs	Head of Housing	

					service as a whole is in train and has been reported to Scrutiny and Cabinet.		
	9	Our private rental tenants across the district are able to live safely in their homes.		100% of Landlords contacted within the specified time-period within the MEES policy for non-compliance.	<p>100% of Landlords were contacted within the time period specified by the MEES Policy.</p> <p>The number of non-compliant properties following enforcement intervention in Q4 in the District has reduced to seven. The baseline number in September 2023 was 118.</p>	Head of Community Services	
				Creation of a Private Sector Housing Charter.	Further work has taken place to update landlord specific information on the Council's website. A second meeting of the relaunched landlord's forum has been arranged and promoted	Head of Housing	


	10	Our food businesses meet food safety standards.	81.3%	2024/25 81% of food businesses having a hygiene rating of 5 (very good)	81.3% of food businesses were assessed as having a hygiene rating of 5.	Head of Community Services	
	11	Our two major leisure centres in Ashby and Whitwick and Coalville provide good services to our communities.		The leisure centres will be assessed independently against a national standard and achieve a 'good' or higher rating. (This will be provided annually in Q3	Reported on in Q3	Head of Community Services	

 Clean and Green	12	We will have reviewed our waste service so that it is easy for the public to use and our recycling performance will be improved.		43% Recycling rate 2023/4	<p>In Leicestershire, the Council remains second behind Harborough District Council with a 44.7% recycling rate for 2023-24 (The latest published figures from Defra).</p> <p>It is the tenth best performing council in the East Midlands region, and it is ranked 125th out of 320 of all councils in England.</p> <p>Data is a year behind, but target met Q4 23/24</p>	Head of Community Services	
	13	We will aim to be carbon neutral as a Council by 2030, and as a district by 2050.		2023/4 Development of assessment work and target setting	<p>Estimating the cost of net zero for the Council is dependent on Asset Management Plans which are being developed for both Housing (to inform budget 26/27) and Property Services (to inform budget 27/28), and fleet replacement.</p> <p>Fleet replacement plans are linked to the Waste Services review which will be presented to Cabinet in April and whilst options will be explored, it is</p>	Head of Community Services	

					<p>unlikely that any vehicles purchased will be electric. Food Waste collection vehicles procurement is underway and these will not be electric due to the cost difference and government funding. Non-electric fleet will continue to run on Hydrogenated Vegetable Oil (CVO).</p> <p>Gas and electric utility meters have been updated to automated meter reading (AMR) – the final few will be completed by June. The new Corporate Assets and Facilities Management (CAFM) system roll out will provide visibility of usage at building level for users.</p> <p>Across the district, the Council is working collectively as the Green Living Leicestershire (GLL) partnership. Grant funding and support schemes to help residents improve the energy efficiency of their homes ended in March. GLL has</p>		
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					<p>applied for the funding for the follow-on Warm Homes grant to continue to help residents improve the energy efficiency of their homes.</p> <p>The current Solar Together scheme ended in March and a future offer is being considered. Energy Switch, a collective buying utility scheme, ran in March and a summer auction is planned.</p> <p>Under LEVI project, a solar PV electric vehicle charging hub is at Moneyhill car park tender is underway and rural EV charge points tender is due in April.</p> <p>Working with the LCAN project, led by Leicestershire County Council (LCC) and other parties, workstreams include developing local area energy plans and promoting community energy. A new Greener</p>		
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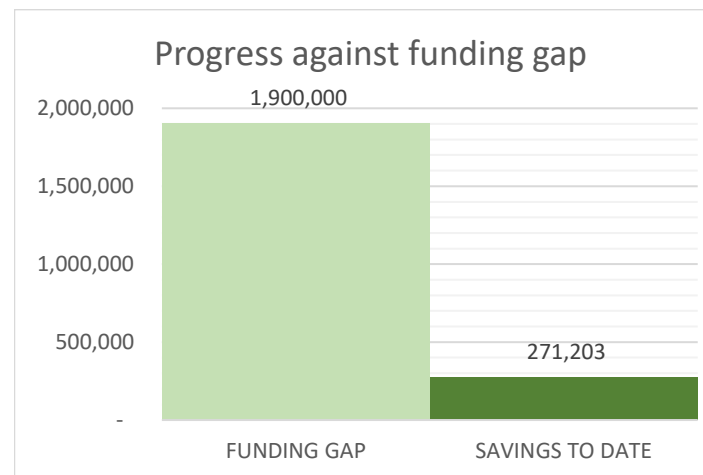
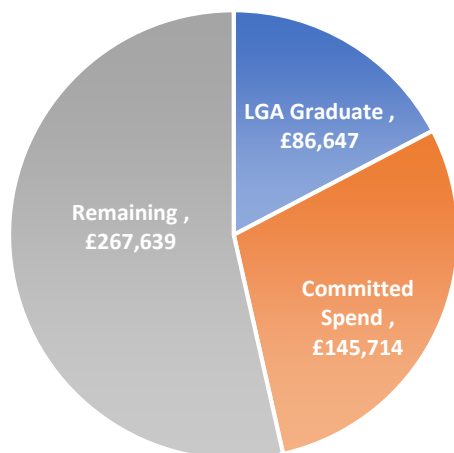
					Future website has been launched.		
	14	We will increase the biodiversity of our District.		10% Biodiversity Net Gain on large developments with planning permission	This is a mandatory requirement for major planning applications and some smaller planning applications after February and April 2024, so will be achieved on all relevant planning permissions issued after these dates.	Head of Planning and Infrastructure	
	15	We will have produced a Tree Management Strategy to better manage our tree stock.		2024/25 Publication of updated tree management strategy	Work to catalogue the portfolio of the Housing tree estate is ongoing. With regards to the Tree Management Strategy, this was presented to Community Scrutiny for feedback in February. Following further amends, the document was corporately adopted by Cabinet at their meeting in March. Work will now commence on the associated Action Plan.	Head of Community Services	

 A well-run Council.	16	Our customers are at the heart of everything we do.	74% overall across both stages Stage 1 – 73% Stage 2 – 78%	2024-5 80% of Complaints responded to on time by end of year	Progress on response times since Q3 (where performance was 58% overall). Complaint investigation training rolled out to team leaders and above plus those who regularly investigate complaints. Root Cause analysis work ongoing with waste services.	Customer Services Team Manager	
	17	We will provide value for money services.		Unqualified Opinion to be provided	<p>The Council is working its external auditors, Azets on the completion of the Statement of Accounts 2023/24.</p> <p>There is a focus on resolving historic issues following the implementation of the new finance system in 2023. This will support the closedown process.</p> <p>Additional resources are in place to support the closedown process.</p>	Head of Finance	
	18	We live within our means		Zero funding gap	The Council has developed a Transformation Programme to support closing the funding gap over the medium term.	Head of Finance	

					<p>In addition, work will commence in Spring 2025 to support the budget setting for the 2026/27 financial year with a focus on finding additional savings or income to close the funding gap.</p> <p>A balanced budget for 2025/26 has been approved with a contingency budget created to support uncertainty over both the short and medium term.</p>		
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Performance of Transformation Delivery Plan

£500k Funding



Expenditure	£	Comments
Additional communications support	13,844	Increased from 13,603 due to pay increase
HR support	64,038	Project is under review
Customer contact	45,984	
LGA Graduate	86,647	
Microsoft CoPilot proof of concept	20,600	Configuration and training costs now confirmed and added.
GovDelivery upgrade	1,248	Upgrade to add additional topics for increased reach and engagement
Total Spend	232,361 one off	
Savings to date	271,203 ongoing	

Transformation Projects

Ref	Transformation Project Name and description	Start Date	End Date	Approved Budget	Planned Savings / Revenue	RAG Status	Previous Quarter
TR1	Strategic Communication Support – Increased working hours for the Communications Team Manager	Apr 24	Mar 25	£13,603 (£13,844 actual)	N/A		
Project Status	Key Deliverables		Q4 update				
Approved	Employee Survey Delivery of Staff Roadshows Transformation Comms Strategy in place		Workplace stress survey Staff Roadshows Transformation Comms Strategy Additional colleague engagement opportunities implemented including knowledge exchange, “in conversation with” and a formalised Team Leaders forum. Project closed and 2025/26 funding from LGR budget				
Live							
Delayed							
Closed							

Ref	Transformation Project Name and description	Start Date	End Date	Approved Budget	Planned Savings / Revenue	RAG Status	Previous Quarter
TR2	Additional HR Support (Waste Services sick absence management)	Sep 24	Jun 26	£64,038 No spend to date	TBC		
Project Status	Key Deliverables		Q4 update				
Approved	Reduced sickness absence rates in Waste Services						

Live	Reduced budget overspends – reduced agency costs. Achieve vacancy savings	Project is currently on hold while the deliverables and benefits are re-assessed. Wider root cause analysis of agency spend across the whole organisation to be carried in 2025/26 out as part of a larger project, to be taken forward by new Head of HR & OD
Delayed		
Closed		

Ref	Transformation Project Name and description	Start Date	End Date	Approved Budget	Planned Savings / Revenue	RAG Status	Previous Quarter
TR10	Customer Contact Improvement - improving how our customers contact and interact with the Council.	Sep 24	Apr 26	£45,984	£34,000 (non-cashable)		

Project Status	Key Deliverables	Q4 update
Approved	Analysis of customer contact Website content and content management review Wholesale customer contact review (including written – letters, emails – and verbal – phone, in person) Ongoing complaint analysis (already underway) Staff training (customer contact, complaint handling, tone of voice – some already underway) Topic-specific customer focus groups Central 'knowledge hub' for customer contact Improved website content Reduced avoidable calls. Enhanced customer complaint handling	Project Support Officers are in post have completed the following: Created project plan Commenced work on website (top tasks, data extract, web editor permissions, expired / embargoed web pages) Baseline figures, key issues and common themes identified for avoidable contact. Workshop with Waste Services on avoidable contact
Live		
Delayed		
Closed		

Ref	Transformation Project Name and description	Start Date	End Date	Approved Budget	Planned Savings / Revenue	RAG Status	Previous Quarter
TR16	Microsoft CoPilot Proof of Concept (25 users)	Oct 24	TBC	£20,600	N/A		
Project Status	Key Deliverables			Q4 update			
Approved	Creation of baseline information that can be used to inform an organisation wide rollout of Microsoft CoPilot Potential for future savings assessed. DPIA + Privacy Notice. AI Usage Policy			Procurement of configuration and training underway and cost of this is £13,100 List of 25 Super Users finalised DPIA and Usage Policy drafted.			
Live							
Delayed							
Closed							

BUDGET HOUSEKEEPING INITIATIVES						
Ref	Description	Start Date	Update / Comments		Savings 2024/25	Savings 2025/26
TR3	Review of ICT Contracts	Apr 24	Total contract spend before savings = £771,570 Reduce rolling contracts OMS Legal has moved to IKEN under a new five-year contract. House on the Hill the IT service desk system is moving to a five-year renewal next year, saving around £6k - Total savings over five years will be £10,695		£388	£2139

TR9	Budget Housekeeping	Apr 24		£270,815	£573,000 (planned)
TR15 NEW	Contract Management	Jan 25	Track savings from contract management.		

OTHER PROJECTS - MONITORED BY TRANSFORMATION				
Ref	Project Name and Description	Project Benefits / Deliverables	Planned Savings / Revenue	Update / Comments
TR4	Waste Services Review	TBC – Business Case being reviewed / updated New improved waste collection system	TBC	Scrutiny and Members workshop held on 27th March Going to Cabinet on 22nd April.
TR5	Parking Review	No change to parking occupancy Number of violations Simplified and aligned charging structure Enhanced electric vehicle charging points	TBC	Paused
TR6	Council Tax Discounts and Exemptions and Discretionary Rates Relief Paul Stone	Additional Revenue Reduction in number of empty homes	£26k + 2nd home premium TBC	Cabinet approved the council tax discounts and exemptions in January 2025, which are expected to generate an additional £26,000 in council tax income. The Second Homes Premium will be implemented in April 2026, with the additional income to be calculated at that time

TR8	UNIT4 finance system enhancements	A Unit4 system that has wide range functionality Implementation of systems such as budget monitoring Further implementation of other financial management systems	N/A	Embridge have deadline of end April 25 to resolve the issues around: Automated bank reconciliation Direct debit processing Automated invoice payment (Proactis) Project Manager in place and working well with the Council.
TR11	Capital Asset Facilities Management (CAFM)	Consolidated list of all properties across NWLDC £120k increased revenue over 3 years (estimate based on benchmarked data) £200k capital receipts over 3 years (disposal of surplus property – estimate) Reduction in compliance risks (no baseline) Reduced exposure to legal, financial and safety risks (no baseline) Quicker turnaround when addressing property defects (no baseline)	£120k (over 3 years) £200k in capital receipts (over 3 years)	Overview sessions have started to highlight system functionality to Property Services staff. Project Plan received from Concerto. Over 1/2 of sites have been sent to Concerto. and working through the rest of the sites. On track to have all uploaded by end of April.
TR12	Council Wide Document Management / Intranet 2.0	An improved and efficient intranet A cleansed intranet site with the most up to date information	N/A	Paper to CLT on discuss the document management process and controls May 2025

NORTH WEST LEICESTERSHIRE DISTRICT COUNCIL

CORPORATE SCRUTINY COMMITTEE – THURSDAY, 19 JUNE 2025



Title of Report	2024/25 QUARTER 3 GENERAL FUND AND HOUSING REVENUE ACCOUNT UPDATE	
Presented by	Paul Stone Strategic Director of Resources	
Background Papers	Cabinet 25 March 2025 2024/25 Quarter 3 General Fund Update 2024/25 Quarter 3 Housing Revenue Account Update	Public Report: Yes
Financial Implications	The report outlines the financial position of both the General Fund and Housing Revenue Account as at Quarter 3 2024/25.	
	Signed off by the Section 151 Officer: Yes	
Legal Implications	No legal implications arising from this report.	
	Signed off by the Monitoring Officer: Yes	
Staffing and Corporate Implications	Any staffing implications of this report are detailed in the body of the report and the attached appendices.	
	Signed off by the Head of Paid Service: Yes	
Purpose of Report	To provide Corporate Scrutiny with an update on the financial position for the General Fund and HRA as at Quarter 3 2024/25.	
Recommendations	THAT CORPORATE SCRUTINY COMMITTEE: 1. NOTES THE FORECAST OVERSPEND ON GENERAL FUND FOR 2024/25 AND THE FORECAST UNDERSPEND ON THE HOUSING REVENUE ACCOUNT 2024/25; AND 2. PROVIDES ANY COMMENTS FOR CONSIDERATION BY CABINET WHEN IT RECEIVES ITS NEXT QUARTERLY UPDATE	

1.0 BACKGROUND

- 1.1 To update Members on the financial position of the Council following the third quarter's budget monitoring exercise for both the General Fund and Housing Revenue Account details of which were reported to Cabinet on 25 March 2025. Both reports are shown in Appendix A and B.

2.0 GENERAL FUND

- 2.1 The "2024/25 Quarter 3 General Fund Finance Update" provides an overview of the financial position of the General Fund for the period 1 April 2024 to 31 December 2024. The report highlights a forecasted overspend of £977k for the 2024/25 financial year. The major contributors to the overspend are:
- **Staffing Costs:** £1,016k due to recruitment challenges and higher interim resource costs.
 - **Income Shortfall:** £366k from vacant rental units and reduced external work for Legal Services.
 - **Other Costs:** £368k from increased demand for temporary accommodation, repairs, and maintenance.
- 2.2 The report also details the capital programme for the same period with significant expenditure on Disabled Facilities Grants (DFG), Marlborough Square Improvements Works, UK Shared Prosperity Fund (UKSPF) Investment Programme and the fleet replacement programme.
- 2.3 In terms of Treasury Management, the report outlines the Council's borrowing and investment activities, noting a reduction in borrowing interest expenditure due to the early repayment of a loan and an increase in investment income from higher rates of return from Money Market Funds.
- 2.4 The Council's reserves are also discussed, with a forecasted balanced of £23.2m by the end of the financial year, including earmarked reserves for specific purposes.
- 2.5 Overall, the report provides a detailed analysis of the financial challenges faced by the Council, the measures being taken to address them and the forecasted financial position for the remainder of the financial year.

3.0 HOUSING REVENUE ACCOUNT (HRA)

- 3.1 The report highlights a forecasted underspend of £1.6m for the 2024/25 financial year. The major contributors to the underspend are:
- **Staffing Costs:** £101k underspend due to vacant posts.
 - **Repairs and Maintenance:** £551k underspend due to delays in contractor work.
 - **Income:** £589k more than budgeted from rent and service charges due to fewer void properties.
 - **Investment Income:** £412k improvement due to favourable interest rates.

- 3.2 The HRA capital programme includes the Home and Estate Improvements Programme and the New Supply Programme. The Home and Estate Improvements Programme covers a range of works, including vital fire safety works, major aids and adaptation works, transforming older persons schemes to an integrated digital service, replacing heating schemes, and undertaking estate improvement works. The New Supply Programme aims to increase the number of affordable and social housing units across the district. As of quarter three, expenditure on the capital programme was £2.2m, with significant spending on the Home Improvement, New Supply and Estates Improvement Programme and major aids and adaptations.
- 3.3 The report also provides an update on HRA reserves, which are forecasted to have a balance of £18.8m by 31 March 2025. This includes a minimum balance of £1m to cover unforeseen revenue expenditure, with the remaining £17.8m allocated for capital projects and debt repayment.
- 3.4 Overall, the report emphasises the Council's commitment to improving services delivered by the HRA, addressing financial challenges and ensuring the impact on tenants is considered in all service delivery. The Council is actively working on improving processes, recruiting staff to key vacant roles and preparing plans for further actions within the service.

4.0 SUMMARY

- 4.1 The Council aims to tackle the overspends through the proposals outlined in the 2025/26 budget, which was approved by the Council in February 2025. These proposals focus on aligning budgets to address income shortfalls and providing additional capacity.
- 4.2 The Council has implemented process enhancements to ensure greater focus and collaboration with key stakeholders in the budget monitoring process. The Council continues to work on enhancements and improvements to its finance system. Additionally, there will be a rollout of training in the coming months to support budget holders with budget monitoring reports in the finance system.

Policies and other considerations, as appropriate	
Council Priorities:	A well-run council
Policy Considerations:	Capital Strategy 2024/25 Treasury Management Strategy 2024/25
Safeguarding:	None
Equalities/Diversity:	None
Customer Impact:	None
Economic and Social Impact:	None
Environment, Climate Change and zero carbon:	None
Consultation/Community Engagement:	None
Risks:	Overspending will necessitate the use of reserves, which are set aside to cover unexpected expenses or revenue shortfalls.
Officer Contact	Anna Crouch Head of Finance anna.crouch@nwleicestershire.gov.uk

**NORTH WEST LEICESTERSHIRE DISTRICT COUNCIL
CABINET – TUESDAY, 25 MARCH 2025**



Title of Report	QUARTER 3 GENERAL FUND FINANCE UPDATE	
Presented by	Councillor Nick Rushton Corporate Portfolio Holder <div style="text-align: right;">PH Briefed <input type="checkbox"/> Y</div>	
Background Papers	Council 22 February 2024: General Fund Budget and Council Tax 2024/25	Public Report: Yes
	Cabinet 9 January 2025: 2024/25 Quarter 2 General Fund Finance Update	Key Decision: Yes
Financial Implications	Any financial implications of this report are detailed in the body of the report and the attached appendices.	
	Signed off by the Section 151 Officer: Yes	
Legal Implications	No legal implications arising from this report.	
	Signed off by the Monitoring Officer: Yes	
Staffing and Corporate Implications	Any staffing implications of this report are detailed in the body of the report and the attached appendices.	
	Signed off by the Head of Paid Service: Yes	
Purpose of Report	To provide Cabinet with an update on the financial position on the General Fund as at Quarter 3 2024/25.	
Reason for Decision	Cabinet is responsible for making all of the necessary arrangements to ensure that the priorities identified by the Council are delivered within the Budget and Policy Framework and therefore financial reporting is brought to Cabinet to ensure that oversight is carried out. To update Cabinet on Quarter 3 2024/25 and request approval for supplementary estimates as detailed in the recommendations below.	
Recommendations	CABINET IS RECOMMENDED TO: 1. NOTE THE FORECAST OVERSPEND ON GENERAL FUND FOR 2024/25 OF £977K BASED ON QUARTER 3 INFORMATION.	

	<p>2. NOTE THE SPECIAL EXPENSES FORECAST OUTTURN FIGURES FOR 2024/25 BASED ON QUARTER 3 INFORMATION.</p> <p>3. NOTE THE SUPPLEMENTARY ESTIMATES DETAILED ON APPENDIX 2 WHICH ARE BELOW £100K AND ARE EXTERNALLY FUNDED.</p> <p>4. APPROVE THE SUPPLEMENTARY ESTIMATES DETAILED ON APPENDIX 2 WHICH ARE ABOVE £100K AND ARE EXTERNALLY FUNDED.</p> <p>5. APPROVE ALL SUPPLEMENTARY ESTIMATES DETAILED ON APPENDIX 2 WHICH REQUIRE COUNCIL FUNDING.</p> <p>6. NOTE THE REVISED GENERAL FUND CAPITAL PROGRAMME DETAILED IN APPENDIX 5.</p> <p>7. APPROVES THE MOVEMENT FROM THE DEVELOPMENT POOL TO THE ACTIVE PROGRAMME FOR THE CAPITAL SCHEME DETAILED IN TABLE 5.</p>
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1.0 PURPOSE OF THE REPORT

- 1.1 To inform Members of the spending position for the period 1 April 2024 to 31 December 2024 for the Council's General Fund focusing on the significant variances from the approved budgets. It should be noted that due to the subsequent backlog issues from the finance system implementation and the delay to closing the 2023/24 accounts, the in-depth analysis of the figures which would usually be undertaken has not been possible. Therefore, the focus has been on reporting the major variances based on the information available and discussions between Finance and the budget holders.
- 1.2 To update Members on supplementary estimates requested, to request approval for those over £100k which are externally funded, and for approval for those over £100k which are Council funded.
- 1.3 To update Members on the capital programme for the period 1 April 2024 to 31 December 2024 on the proposed resourcing of the capital programme and the level of Council capital resources available, including capital receipts.
- 1.4 To update Members on the changes to the capital programme and note the variations to scheme budgets and re-profiling of budgets to future years.
- 1.5 To provide Members with an update on the Council's Treasury Management activity during the period 1 April 2024 to 31 December 2024.

2.0 GENERAL FUND

2.1 General Fund Revenue

- 2.1.1 Table 1 below summarises the third quarter position summarised by Directorate. The current projections are that an overspend of £977k on the overall General Fund budget is expected for 2024/25.

Table 1 – General Fund Revenue 2024/25 Quarter 3 Forecast Outturn Position

Directorate	Revised Budget	Forecast	Variance	Variance
	£000	£000	£000	%
Chief Executive Directorate	2,677	2,892	215	8.03%
Place Directorate	2,485	2,885	400	16.10%
Community Services Directorate	7,166	8,136	970	13.54%
Resources Directorate	5,262	6,074	682	12.65%
Corporate & Democratic Core & Other Budgets	805	317	(488)	(60.62%)
NET COST OF SERVICES	18,525	20,304	1,779	9.60%
Net Recharges from General Fund	(1,859)	(2,084)	(225)	
NET COST OF SERVICES AFTER RECHARGES	16,666	18,220	1,554	
Total Corporate Items and Financing	1,496	939	(557)	
NET REVENUE EXPENDITURE	18,162	19,159	997	
Contribution to/(from) Balances/Reserves	(751)	(751)	0	
NET EXPENDITURE (AFTER RESERVE CONTRIBUTIONS)	17,411	18,408	997	
FUNDING TOTAL	(17,411)	(17,431)	(20)	
FORECAST (UNDERSPEND) / OVERSPEND	0	977	977	

- 2.1.2 Cabinet should note that although the position is a forecast, and could change by 31 March 2025, the overspend has been funded from the MTFP reserve in year. The Council's MTFP reserve was set up to manage deficits and funding volatility. It was created to ensure financial stability and sustainability over the medium term. It helps the Council manage financial risks and uncertainties such as economic fluctuations and unexpected expenditures. Work is still required between now and the end of the year to ensure the ledger is up to date for 2023/24 and 2024/25. As the 2023/24 data is yet to be finalised, this places risk on the 2024/25 data and any brought forward balances from 2023/24. To mitigate the risk additional short-term investment in the Finance Team means there is capacity to not only address the backlog but work on improving processes, implementing new systems and exploring system functionality. Despite the challenges, the Section 151 Officer is confident in the robustness of the financial forecasts. The Finance Team is working to process all transactions as swiftly as possible while maintaining accuracy and compliance with regulatory standards. The Council understands the importance of timely financial reporting and is committed to resolving

these delays. In the interim, our forecasts have been carefully constructed by collaborating closely with officers from all departments.

2.1.3 There are several variances that make up the forecast outturn detailed above. Appendix 1 gives a more detailed analysis of the forecast outturn variances by service.

2.1.4 A summarised analysis of the major factors that are contributing to the overspend are detailed below:

Staffing £1,016k

- There is a national issue for recruiting and retaining appropriately experienced staff into local government, North West Leicestershire is no different. To ensure the Council meets its duties, interim resource is being procured at generally a much higher cost than permanent staff.
- The 2024/25 Local Government Pay Award was nationally agreed recently, this is on average 1% above the amount included in the MTFP.
- The cost pressure is across the Council, with Waste Services being the highest.

Income £366k

- Vacant rental units are reducing the Council's income, along with agreed rent free periods due to unsuitable building conditions.
- Legal Services is unable to achieve the budgeted income due to a lack of external work.

Other Major Items (£368k)

- Temporary Accommodation demand and costs have increased across the district. Temporary accommodation is housing provided by the Council to individuals or families who are homeless or at risk of becoming homeless. Although new permanent units are being made available, there is a continual demand to replace those who have left temporary accommodation. This is a trend that is replicated across Leicestershire and the country as a whole.
- Repairs and maintenance to the Council's properties is increasing due to aging buildings and poor weather conditions.
- Repairs and maintenance of Council vehicles is increasing due to aging fleet.
- Higher than budgeted increase to the insurance premiums. This is not expected to be an ongoing cost, due to the approval of an Insurance Officer in the budget for 2025/26 who will proactively manage the contract.
- Treasury management savings due to Minimum Revenue Provision being lower than budgeted due to a reduction in borrowing and a loan being repaid earlier than budgeted.

2.1.5 The overall forecast outturn is an estimate based on current knowledge; these are subject to change. Many of the pressures have happened and the Council does not anticipate any fundamental changes that will affect the forecast, therefore the forecast overspend of £977k is expected to be funded from the MTFP reserve. This has been reflected in Table 2 show later in the report..

2.1.6 To provide a clearer understanding of the pressures mentioned above, the following paragraphs offer detailed context.

Movement from Quarter 2 £2,136k to Quarter 3 £977k

2.1.7 The significant changes when comparing quarter three to quarter two are:

- Treasury Management (£558k) - savings due to Minimum Revenue Provision being lower than budgeted due to a reduction in borrowing and a loan being repaid earlier than budgeted. Minimum Revenue Provision (MRP) is the minimum amount that a council must set aside from its revenue budget each year to repay its external borrowing (loans)
- Planning Applications (£199k) – an upturn in planning applications in the last quarter is now expected meaning the Council will receive additional income compared to that at Quarter 2.
- Temporary Accommodation, (£101k) – additional central government grant funding received and reduction in forecasted costs.
- Staff costs (£86k) – the forecasted staff costs have been revised downward.

Recruitment and Retention

2.1.8 Local authorities are increasingly facing rising costs due to their reliance on agency workers, as they struggle to fill permanent positions. According to a report by the Local Government Association (LGA), this trend is driven by a shortage of qualified candidates for essential roles, leading councils to depend on more expensive temporary staff.

- Approximately 16% of finance posts across England were vacant. 26% of accountancy roles were vacant, 21% of internal audit roles were vacant and 20 per cent of business partner roles were vacant.
- On average, local authority finance teams had a turnover of approximately 12.5% per annum and rising. Turnover in districts was higher. The main reason for employees leaving the service was for money. Staff leaving for retirement was the second most common reason.
- 4.5% of the finance workforce were agency/interim staff, with increasing expenditure forecast in this area. Most respondents stated that the main reason for using agency staff and interims was because the recruitment exercise did not deliver.

2.1.9 The inability to fill essential posts has significant implications for the services provided by local authorities. For instance, if key positions in waste management are not filled, waste collection and disposal services could be disrupted, leading to public health concerns and environmental issues.

2.1.10 The Council's struggle to recruit finance professionals is challenging. These roles are essential for ensuring that the Council meets its legislative requirements, such as delivering statements of accounts within statutory timeframes. Although the Council has faced challenges in this area, it has prioritised recruiting for positions that ensure compliance with the new financial reporting regime. Treasury management is another vital function that requires skilled personnel. Effective treasury management ensures that the Council has sufficient cash flow to pay its creditors and that surplus balances are invested to maximise income for the Council. Qualified staff in these roles, are essential to manage the Council's financial stability.

2.1.11 Planning is also an essential service that local authorities provide. However, recruiting for planning posts is particularly challenging. Planning income is volatile and hard to predict, making it difficult to manage budgets effectively. Planning departments are crucial for managing development and ensuring that local infrastructure meets the needs

of the community. Ensuring adequate staffing, reduces delays in planning approvals and inspections and aids local development projects and economic growth.

2.1.12 Recruitment and retention of legal posts is also challenging. The service has carried out a restructure and is offering market supplements in addition to the substantive grade. As a full legal service is needed to ensure the council is operating legally, any vacant posts are being covered by agency whilst recruitment takes place.

2.1.13 In summary, the reliance on agency workers due to recruitment challenges in essential areas such as finance, treasury management, legal and planning is driving up costs for local authorities. This not only puts pressure on budgets but also impacts the quality and reliability of the services they provide to the community.

Vacancy Control

2.1.14 Most local authorities make assumptions on how much will be saved through the gap between employees leaving and replacements taking up the vacant posts. These assumptions are fed into the budget process at the start of the financial year – this is called the vacancy allowance.

2.1.15 The Council operates a vacancy allowance whereby all services have a 3% rate which reduces the service budget. If the vacancy rate were to be removed entirely, then the Council would need to find additional ongoing savings. Vacancy savings are delivered when a post is vacant for any period of time, e.g. a post is vacant on 1 January 2024, and is not filled until 1 March 2024 i.e. two months. If the post was budgeted at £20k, then a saving of £3k would be delivered against the vacancy target.

2.1.16 Therefore, if a service does not have significant turnover, it is unlikely to meet its vacancy rate saving. Within waste services, there has been a range of factors that have contributed to the overspend. Whilst this includes the cost of agency to ensure delivery of frontline services, there have been further pressures from the vacancy allowance, loss of income from HRA services and vehicle parts.

Temporary Accommodation/Homelessness

2.1.17 There have been additional cost pressures associated with temporary accommodation; an issue reflected at the national level. This is a critical service, especially given the rising number of households in need. At the national level, according to the Local Government Association (LGA), the number of households living in temporary accommodation has increased by 89% over the past decade.

2.1.18 Several factors contribute to the reliance on temporary accommodation. These include:

- **Shortage of Social Housing:** There is a severe shortage of affordable social housing, forcing councils to use private temporary accommodations, such as hotels and Bed and Breakfast accommodation, which are more costly.
- **Rising Cost of Living:** The increasing cost of living and frozen Local Housing Allowance (LHA) rates have exacerbated the situation, making it harder for councils to find suitable permanent housing.
- **Homelessness Prevention:** Temporary accommodation is a crucial part of homelessness prevention strategies. It provides a safety net for those who have lost their homes, ensuring they have a place to stay while more permanent solutions are sought.

- **Financial Viability:** The gap between the costs incurred by councils for temporary accommodation and the amount reimbursed by the government has strained local government finances. Over the past five years, this subsidy gap has cost councils more than £700 million.

- 2.1.19 The use of temporary accommodation, while essential, is a significant financial burden on local authorities. Recent analysis demonstrates 8,083 cases across the district councils in the county during the period 2022 – 2024, with Hinckley and Bosworth, Charnwood and Harborough seeing the highest number of cases. Total overspends across Leicestershire districts was £1.5m and £0.9m in 2022/23 and 2023/24 respectively.
- 2.1.20 The financial pressures faced by local authorities in respect of homelessness was recognised in the Government's Autumn Statement with additional funding announced, however, this will not be allocated to local authorities until the 2025/26 financial year.

MTFP Savings

- 2.1.21 Savings proposals included in the previous year's MTFP of £550k in 2025/26 have been reviewed. £317k have been achieved, £83k will not be achieved and have been reversed in the recently approved MTFP and £150k is still expected to be achieved in future years. The detailed proposals are show in Appendix 1 (a).

Summary

- 2.1.22 While there is an overspend, the Council has incorporated mitigations in the budget proposals for 2025/26 to address some of the financial challenges. The challenges the Council faces are significant and common across all local authorities, indicating that the Council is not unique in this regard. The Council's focus will be on mitigating overspends in specific areas, for example, utilising market supplements for the difficult to recruit to posts.
- 2.1.23 Whilst suboptimal, the Council remains committed to ensuring financial sustainability over the medium term. The Council's transformation programme will aid in developing proposals that ensure that services deliver value for money. Departments will continue to review budgets to achieve necessary savings, despite the challenging and volatile climate and the rising demand for our services.

2.2 Virements

- 2.2.1 A virement is where one or more budget(s) are reduced to fund an increase in another budget(s). There is no net change in the total budget agreed by Council arising from a virement.
- 2.2.2 There are no virements within quarter three which require approval by either Cabinet or Council.

2.3 Supplementary Estimates

- 2.3.1 Supplementary estimates are a process that was also approved as part of the Constitution by Council in February 2023 as per paragraph 2.2.2 above.
- 2.3.2 A supplementary estimate is an addition to the Council's agreed budget and should only be considered after all other options such as virements or savings have been considered.
- 2.3.3 Supplementary estimates include budgets fully funded by external grants or contributions.

2.3.4 All supplementary estimates which require Council funding require Cabinet approval, whereas those fully externally funded are reported to Cabinet below £100k and require approval over £100k.

2.3.5 Appendix 2 details all supplementary estimates grouped by value and funding with details of the reasons for the requests. As can be seen from Appendix 2, the total external funding to be included in the 2024/25 budgets is £352k and the total to be transferred from reserves is £356k.

2.4 Section 106 Agreements

2.4.1 Section 106 agreement funds of £8.2m were held by the Council as at 31 March 2024. During the financial year, the Council has received an additional £2.0m contributions and £3.9m has been spent so far by the County Council, Police Authority and parish councils. A breakdown of the £6.2m balance as at 31 December 2024 is provided at Appendix 3.

2.5 General Fund Reserves

2.5.1 The Council holds reserves that are earmarked for a particular purpose and are set aside to meet known or predicted future expenditure in relation to that purpose. The reserves are monitored alongside the budget as part of budget monitoring.

2.5.2 Assuming that reserves are utilised in line with the timescales agreed as part of their approval, reserves represent an effective means of utilising surpluses and underspends whilst also ensuring delivery of projects.

2.5.3 Best practice indicates that reserves, if set aside for specific purposes, should be spent in accordance with projections. Finance clinics (this is a dedicated meeting between finance officers and Heads of Service/Team Managers) focus on ensuring that earmarked reserves are expended in a timely manner in line with the purposes in which they have been set aside.

2.5.4 Table 2 below summarises the forecasted position in respect of earmarked reserves and other reserves held by the Council. Full details by service can be found in Appendix 4.

Table 2 – Usable Reserves forecast as at 31 March 2025

Service Area	Provisional Balance as at 01/04/2024	Forecasted Movement (From)/To Reserves 2024/25	Forecasted Balance as at 31/03/2025
	£000	£000	£000
Service Earmarked Reserves	5,111	(89)	5,022
Business Rates	5,822	6,728	12,550
MTFP	7,588	(1,945)	5,643
Special Expenses	102	(90)	12
Total Earmarked Reserves	18,623	4,603	23,226
Unallocated			
General Fund	1,544	0	1,544
Special Expenses	61	0	61
Total Reserves - General Fund & Special Expenses	20,228	4,603	24,831

2.6 General Fund Capital

- 2.6.1 The 2024/25 revised budget for General Fund capital is £14.532m and spend up to 31 December 2024 is £3.551m, which is 24.4% of the revised budget. The forecast outturn is £7.048m, 48.5% of the revised budget.

Table 3 – Quarter 3 2024/25 Outturn on the General Fund Capital Programme

Scheme	Revised Budget	Actual Expenditure	Forecast Outturn	Variance
	£000	£000	£000	£000
Active Programme	6,273	1,251	3,540	(2,733)
Development Pool	3,286	67	660	(2,626)
REFCUS	4,973	2,233	2,848	(2,125)
TOTAL	14,532	3,551	7,048	(7,484)

- 2.6.2 Schemes with the significant expenditure in this financial year include:

Disabled Facilities Grants—

The revised budget for the Disabled Facilities Grant (DFG) for the year is £2.946m, which is the amount brought forward from previous years. The actual expenditure to Quarter 3 was £0.490m. The forecast outturn is £0.640m. This project is dependent upon residents' take-up.

The DFG can fund adaptations such as ramps, stairlifts, level access showers, or any other modifications that help you navigate your home more easily. Grants are available for owner-occupiers, private tenants, and housing association tenants. The Council is currently investigating methods to better distribute this funding to households in need and will present a report to members on this matter in the near future.

Marlborough Square improvement works – The revised budget for this scheme is £1.370m, of which £1.271m representing 92.7% of the budget has been spent. The forecast outturn for the scheme is £1.551m, 113.2% of the revised budget resulting in overspend of £0.181m, funded by a supplementary estimate, see Appendix 2. This project spans multiple years with previous years spend of £1.5m. The overspend currently predicted is due to variations agreed during the contract and is inclusive of £67k retention fee but exclusive of any other agreed variation that may arise. This project is public realm works in Marlborough Square, and the works are due to complete in May 2025.

UK Shared Prosperity Funds Investment Programme (UKSPF) – There are various projects within this fully grant funded scheme. The grant conditions specified that there is no carry over of funds which means the grant must be fully spent in the year, otherwise, the unspent funds will be returned. The revised budget for this scheme is £0.952m of which £0.253m representing 26.5% has been spent. The forecast outturn position is a spend of £0.920m. There are nine different projects at delivery stage and this will ensure that the grant is fully spent by year end.

Fleet replacement programme – This is the purchase of environmentally-friendly vehicles to deliver council services. The revised budget for the programme is £1.755m of which £0.369m, 21% of the revised budget has been spent as at the end of quarter 3. Spending has been delayed due to the Waste services review being carried out in year.

- 2.6.3 £7.393m capital budget is projected to be carried forward to future years. This is detailed in Table 4 below.

Table 4 – Reprofiled of budget to future years

Scheme	Reprofiled to 2025/26
	£000
Active Programme	2,642
Development Pool	2,625
REFCUS	2,126
TOTAL	7,393

- 2.6.4 The two largest Active Programme budgets that have been re-profiled are £1.385m in relation to Fleet Replacement and £1.1m in relation to Food Waste Rollout.

2.7 Changes to the Capital Programme

- 2.7.1 Schemes in the capital programme are grouped under two categories and these are:

Development Pool: These are schemes not yet fully costed or funding sources identified. A full business case is required to be prepared and presented to the newly implemented Capital Strategy Group for consideration before the scheme can go ahead.

Active Programme: Schemes in this category have been approved (by either Capital Strategy Group, Cabinet or Council), fully funded and are being delivered.

- 2.7.2 Table 5 below details schemes for Cabinet approval to move from the development pool to the active projects.

Table 5 – Scheme Movements and New Schemes

Scheme	Budget	Reason for Movement
Movement from Development Pool to Active Programme		
Solar Photovoltaic (PV) Electric Vehicle Charging Hub at Money Hill Car Park	300,000	Fully grant funded scheme. Considered by Capital Strategy Group and recommended for approval for inclusion in the capital programme.
Total	300,000	

Solar Photovoltaic (PV) Electric Vehicle Charging Hub at Money Hill Car Park

The electric vehicle charging provision in the new Money Hill car park in Ashby de la Zouch will be a solar PV hub. This is a grant funded project under Green Living Leicestershire, led by Harborough DC, which will install a solar charging hub in each district. The funding, provided from business rates pooling fund and government local electric vehicle infrastructure funding (LEVI), will be transferred to the Council via a capital grant allocation and the title of the hub installation will pass to the Council. The asset will be reported under the existing car park budget.

2.8 Prudential Indicators

2.8.1 The prudential Indicators for quarter 3 can be found in Appendix 5a.

3.0 SPECIAL EXPENSES

3.1 Table 6 below summarises the forecast outturn position for Coalville Special Expenses and Other Special Expense areas. Further information is contained within Appendix 6 which provides a more detailed analysis.

3.2 At the end of the third quarter, Coalville Special expenses are forecast to be £4k over budget, Hugglescote Special Expenses (£5k) under budget and Whitwick Special Expenses £14k over budget, with other Special Expense areas forecasting minor variances. It is forecast that budget shortfalls will be funded from reserves available.

Table 6 - Special Expenses 2024/25 Q3 Monitoring and Forecast Outturn Position

SPECIAL EXPENSES	Approved Budget	Forecast Outturn	Variance
	£'000	£'000	£'000
Annual Recurring Expenditure	559	569	10
Expenditure Requirement	559	569	10
Precept	(597)	(597)	0
EMR's not required – returned to balances	0	(30)	(30)
Transfer to/(from) reserves	38	58	20

3.3 The major variances are summarised in table 7 below:

Table 7 – Special Expenses Major Variances

Special Expenses - Major Variances	£'000
<u>Coalville</u>	
Parks, Recreational Grounds, Open Spaces – increased premises insurance	4
Parks, Recreational Grounds, Open Spaces - increased repairs & maintenance	3
Parks, Recreational Grounds, Open Spaces – reduced nndr, service contracts, consumables	(4)
<u>Hugglescote</u>	
Cemetery - reduced Asset protection	(2)
Cemetery – increased burial & monument fees	(3)
<u>Whitwick</u>	
Cemetery - reduced burial & monument fees	14

3.4 The provisional balances as at 1 April 2024 and the forecast outturn as at 31 March 2025 are shown in Table 8 below. Four of the Special Expense areas are forecast to be in a deficit position. The conclusion of the Special Expenses Policy review expects that deficits will be recovered over future years to ensure that a minimum of 10% balances

are retained. This will be addressed as part of the Council's future years budget setting processes.

Table 8 - Forecasted Special Expense Balances 2024/25

SPECIAL EXPENSE BALANCES	Provisional Balances 01.04.24	Forecast Contribution to/(from) Balances	Forecast Balances 31.03.25 Surplus/ (Deficit)
<u>Current</u>	£	£	£
Coalville	33,914	51,824	85,738
Whitwick	6,189	(12,899)	(6,710)
Hugglescote/Donington Le Heath	29,761	13,144	42,905
Coleorton	220	121	341
Oakthorpe & Donisthorpe	(15,606)	5,024	(10,582)
Ravenstone	1,403	117	1,520
<u>Previous</u>			
Lockington/Hemington	2,286	0	2,286
Measham	1,940	0	1,940
Stretton	(1,719)	0	(1,719)
Appleby Magna	2,608	0	2,608

- 3.5 A list of the Special Expense earmarked reserves as at the end of December 2024 are shown in table 9 below. Appendix 7 gives a more detailed analysis.

Table 9 - 2024/25 Special Expenses Earmarked Reserves

EARMARKED RESERVES	Balances 01.04.24	Spend to date	Forecast Spend	Reserves no longer required	Forecast Balance as at 31.03.25
	£	£	£	£	£
Coalville	85,008	8,795	43,041	21,048	12,124
Hugglescote	17,450	6,674	2,000	8,776	0
	102,458	15,469	45,041	29,824	12,124

4.0 TREASURY MANAGEMENT

- 4.1 The following outlines the Treasury position and variance to budget of the Council's Treasury Management function. The Council's Treasury Management Strategy for 2024/25 was approved at a Council meeting on 22 February 2024. The Council has invested substantial sums of money and is, therefore, exposed to financial risks including the loss of invested funds and the revenue effect of changing interest rates. The successful identification, monitoring and control of risk remains central to the Council's Treasury Management Strategy.
- 4.2 Table 10 shows the progression of budgets as at 31 December 2024 for Treasury Management elements.

Table 10 – Treasury Management Forecast Outturn 2024/25

Element	Original Budget	Variance	Revised Forecast
	£'000	£'000	£'000
Investment Interest Income:			
S106 Deductions	(189)	(64)	(253)
GF	(410)	(6)	(417)
HRA	(286)	(412)	(698)
Total	(885)	(482)	(1,368)
Borrowing Interest Expenditure	2,330	(380)	1,950
Borrowing Principal Repaid	1,269	0	1,269
Total	2,714	(862)	1,851

- 4.3 Borrowing interest expenditure forecast has reduced by £0.380m due to:-
- £3.8m planned HRA borrowing not required due to higher than forecast cash holdings,
 - Early repayment of a Lender Option Borrower Option (LOBO) Loan with Commerzbank on the 8 February 2024 after the budget for 2024/25 was proposed. The lender took its option to increase the interest rate from 4.80% to 5.80%. The decision to repay the loan was taken to avoid locking into a high long-term interest rate when cash was available to repay the loan. The Council has no further LOBO loans.
- 4.4 Investment interest income for General Fund and HRA is forecast to increase from £1.32m to £1.37m (before S106 deductions) due to the authority holding higher than forecast balances, which have been mainly invested in well-paying Money Market Funds.
- 4.5 Table 11 shows a summary of the Council's external investments and borrowing along with the rate of return/borrowing of both.

Table 11 – Treasury Summary

	31.3.24 Balance £m	Movement £m	31.12.24 Balance £m	31.12.24 Rate %
Long-term borrowing	55.1	0.0	55.1	3.50%
Short-term borrowing	1.2	(0.6)	0.6	2.25%
Total borrowing	56.3	(0.6)	55.7	3.48%
Long-term investments	0.0	0.0	0.0	0.00%
Short-term investments	25.5	(20.0)	5.0	4.79%
Cash and cash equivalents	5.0	31.0	36.0	4.72%
Total investments	30.0	11.0	41.0	4.73%
Net borrowing	26.3	(11.6)	14.7	

- 4.6 Further information on the Council's borrowing and investments can be found in Appendix 10.
- 4.7 During the reporting period the Council has paid back £0.6m in principle on its Public Works Loan Board (PWLB) loans. It is forecast to repay £1.26m in PWLB loan principle by the end of the year. There is no intention to borrow to replace these loans as the Council currently has the resources to absorb this.

Policies and other considerations, as appropriate	
Council Priorities:	A well run Council.
Policy Considerations:	None
Safeguarding:	None
Equalities/Diversity:	None
Customer Impact:	None
Economic and Social Impact:	The Council plans to invest up to £2.8m in town centre regeneration and public realm works in the current financial year.
Environment and Climate Change:	Up to £0.3m is forecast to be spent on purchasing environmentally friendly vehicles and installing electric vehicle charging points throughout the district in the current financial year.
Consultation/Community/Tenant Engagement:	This report will be considered by Corporate Scrutiny Committee on 19 June 2025.
Risks:	Although inflation has decreased, the impact of the high inflation means the real purchasing power of the Council's reserves steadily erodes, meaning the same amount of money can purchase progressively fewer goods and services. This

	<p>erosion of value poses a challenge to the organisation's ability to maintain financial stability and achieve its long-term financial objectives.</p> <p>The budgets will continue to be monitored throughout the year to ensure the Council remains within its funding envelope.</p> <p>Work is still required between now and the end of the year to ensure the ledger is up to date for 2023/24 and 2024/25. As the 2023/24 data is yet to be finalised, this places risk on the 2024/25 data and any brought forward balances from 2023/24.</p>
Officer Contact	<p>Anna Crouch Head of Finance & Deputy S151 Officer anna.crouch@nwleicestershire.gov.uk</p>

North West Leicestershire District Council
2024/25 Quarter 3 Variances

Service	Revised Budget	Forecast	Total Variance	Pay Award Variance	Other Variance	Total Variance to Budget %	
Chief Executive	201	212	11	2	8	5.47%	The overspend of £8k comprises an overspend of £2k on a corporate subscription to a key local government journal being made electronically available for all staff. Additionally, there was a £6k overspend due to budgeted allowance for a vacancy in the Chief Executive role which did not happen in 2024/25.
Human Resources	733	798	65	20	46	8.87%	The overspend of £46k comprises of £23k recruitment fees and advertising for Heads of Service roles which are not budgeted for on an ongoing basis. Furthermore, there is a £16k overspend due to an allowance being built into the budget for vacancies which did not happen and a 5k shortfall against budgeted income due to changes in the payroll service provision in year.
Legal & Support Services	1,743	1,882	139	44	94	7.97%	The overspend of £94k is as a result of unexpected costs and a reduction of income received. As a consequence of recruitment challenges that the Legal Team has faced over a number of years, the team has used specialist recruitment agencies to fill vacant posts, which has resulted in an overspend of £17k on recruitment costs. Furthermore, the vacancy allowance of £8k has not been achieved due to the need to ensure that all vacant posts are covered, given the specialist nature of the work undertaken, which cannot be absorbed elsewhere. Plans to fix the income shortfall and the staffing budget were approved in the 2025/26 budget.
Chief Executive Directorate	2,677	2,892	215	66	148	8.03%	
Strategic Director of Place	138	141	3	3	0	2.17%	
Property and Economic Regeneration	1,279	1,571	292	44	248	22.83%	<p>There is a £27k underspend in respect of Economic Regeneration: Several events were held successfully across the district. However, they did not meet the expected income targets, falling short by £6k. The vacancy savings achieved were £35k above the corporate target. Furthermore, there was £2k additional spend on repair and maintenance in respect of Moira Furnace.</p> <p>There is an overspend of £277k in Property Services: The Council has an aging property stock which has suffered from a historic lack of investment in maintenance and refurbishment. This is now manifesting as an increasing need for reactive repair leading to expenditure of £156k more than budgeted. Rental income is below the target figure by £125k due to voids and incentives needed to attract occupiers. In addition, there are a number of corporate costs which are attributed to the property budget. These include £9k for corporate catering, £21k for increased postage costs, £12k increased contract cleaning costs. These overspends have been offset by some minor savings including (£12k) vacancy allowance and (£57k) on salary savings.</p>
Planning & Infrastructure	1,071	1,174	103	56	48	9.62%	<p>The majority of the overspend, £90k, relates to Planning & Development. The main overspends relate to £11k vacancy allowance which has not been achieved, £19k publicity budget exceeded, £60k Leicestershire County Council Ecology and Archaeology Consultancy cost exceeds budget, the reason for this is because of the new mandatory requirement to secure a minimum of 10% biodiversity net gain (BNG) on most new developments across the District from April 2024. In order for Leicestershire County Council to provide the required support the Council needs on BNG, an increased service level agreement with the County Council has been necessary to allow them to recruit a number of new Ecology Officers.</p> <p>There is a £46k underspend in respect of Planning Policy largely as a result of exceeding the vacancy allowance.</p> <p>There is a £4k overspend in respect of the Head of Service as the vacancy allowance has not been achieved.</p>
Joint Strategic Planning	(3)	(1)	2	2	0	(66.67%)	
Place Directorate	2,485	2,885	400	105	296	16.10%	
Head of Community Services	111	116	5	3	2	4.50%	£2k vacancy allowance relates to the corporate target for vacancy rates. There have been no vacancies in this role and hence the budget cannot be met.
Community Services	6,515	7,336	821	364	457	12.60%	<p>There is an overspend of £164k in the main to the service not being able to meet corporate vacancy target savings regarding front-line services, largely statutory roles in waste, street cleansing, enforcement and Head of Service</p> <p>The loss of the Housing Services Empty Homes contract has meant that the service does now not receive an income of £106k for this work.</p> <p>With the delay related to the waste container review the costs to maintain an increasingly aging fleet are realising increased cost pressures related to vehicle hire, repair costs and parts resulting in an overspend of £158k</p> <p>Increases to car park lighting electricity costs have proved to be significant resulting in a £45k overspend.</p> <p>There is an overspend of £70k as a result of less income has been realised from less use of public toilets and lower than expected income from market traders related to the delays with the completion of Marlborough Square</p> <p>Some of these additional cost pressures are offset by reduced fuel costs of £62k with the use of Hydrotreated Vegetable Oil.</p>
Strategic Housing	540	684	144	24	120	26.67%	There is a £317k increase in Temporary Accommodation costs, which is related to the increased pressure on our homelessness responsibilities. This is a national issue which the Council has little direct control of. Measures have been and continue to be put in place regarding mitigating this. We have received an additional £309k of funding from Government which offset the overspend in this regard. Other costs are related to staffing to support the above increases in demand and are being considered on how to meet these in budget 2025/26.
Community Services Directorate	7,166	8,136	970	391	579	13.54%	
Strategic Director of Resources	237	259	22	5	16	9.28%	In the main, the overspend relates to the costs of running the Council's Procurement service. The Council initially employed agency staff to support the procurement function at the beginning of the financial year due to unsuccessful recruitment for a permanent officer position. A permanent procurement officer has now been appointed, and a contract for additional procurement support is in place to ensure compliance. From the 2025/26 financial year onwards, these arrangements will ensure that procurement costs remain within budget.

Service	Revised Budget	Forecast	Total Variance	Pay Award Variance	Other Variance	Total Variance to Budget %	
Audit	130	129	(1)	12	(13)	(0.77%)	The forecast is a break-even position with underspends in staffing of £39k offset by overspends of undertaking the IT audit by using external resources.
Finance	1,053	1,562	509	29	481	48.34%	<p>The Council has incurred significant agency costs to support the finance function due to difficulties in filling key technical vacancies. These roles are crucial for ensuring the Council's compliance with financial management. The overspend of £933k has been offset by contributions from funds set aside for these costs and savings from unfilled permanent positions. Additionally, there is a £97k overspend related to the recently renewed insurance contract. To address this, the Council plans to recruit a dedicated insurance officer as part of its 2025/26 budget proposals, aiming to reduce insurance premiums and offset insurance costs.</p> <p>There is also £40k in additional costs due to unforeseen enhancements and maintenance of critical systems such as payroll and exchequer.</p> <p>Furthermore, there is a £19k overspend on IT equipment purchases.</p> <p>The Apprenticeship Levy was overspent by £8k; however, the budget for 2025/26 will be adjusted to ensure costs align with the budget from 2025/26 onwards. The Apprenticeship Levy was introduced in 2017 to fund apprenticeship training. It applies to employers with an annual pay bill over £3m, who must pay 0.5% of their total annual pay bill.</p>
Revenues and Benefits	1,171	1,181	10	36	(26)	0.85%	<p>The service has a minor overspend of £10k, with overspends on salaries of £12k and overtime of £17k, which have been offset by additional income and a new burdens grant.</p> <p>There is an overspend of £5k on Discretionary Housing Payments, offset by an underspend on Hardship Payments. Discretionary Housing Payments provide additional financial support to individuals who are already receiving Housing Benefit or the housing element of Universal Credit but need extra help with housing costs. Hardship Payments are financial aids provided to individuals facing severe financial difficulties. It is challenging to budget accurately for discretionary housing payments and hardship payments due to their fluctuating nature.</p>
ICT	1,221	1,340	119	20	99	9.75%	<p>The service has experienced a savings shortfall of £57k, which was initially planned through a reduction in salary costs. However, alternative savings have been identified, however, these will not be implemented until the 2025/26 financial year to address this shortfall.</p> <p>Additionally, anticipated income from printing recharges has not realised resulting in non-achievement of the income target of £29k against budget.</p> <p>There was also an unforeseen overspend of £18k on IT maintenance costs.</p> <p>These overspends have been offset by grant income of £15k and an underspend on equipment purchases of £6k.</p>
Customer Services	1,010	1,033	23	41	(18)	2.28%	<p>There is a projected overspend of £15k on salaries due to the use of agency staff to ensure service continuity.</p> <p>Additionally, there is a £15k overspend on increased building costs for security, cleaning, and repairs. The additional security costs are necessary to ensure the safety of our staff in the customer centre, following a number of threatening incidents.</p>
Business Change	570	570	0	2	(2)	0.00%	
Resources Directorate	5,392	6,074	682	145	537	12.65%	
Estimated Pay Award and Inflation Contingency	527	0	(527)	(527)	0	(100.00%)	The costs of the pay award are reflected in the forecasts above. This budget for the cost of the pay award will be allocated to departments accordingly and will be reflected accordingly in the financial statement of accounts.
Corporate & Democratic Core & Other Budgets	278	317	39	0	40	14.03%	
Corporate & Democratic Core & Other Budgets	805	317	(488)	(527)	40	(60.62%)	
NET COST OF SERVICES	18,525	20,304	1,779	180	1,600	9.60%	
Net Recharges from General Fund	(1,859)	(2,084)	(225)	0	(224)		
NET COST OF SERVICES AFTER RECHARGES	16,666	18,220	1,554	180	1,375		
Total Corporate Items and Financing	1,496	939	(557)	0	(558)		Lower borrowing costs and early loan repayment leading to a saving against budget
NET REVENUE EXPENDITURE	18,162	19,159	997	180	818		
Contribution to/(from) Balances/Reserves	(751)	(751)	0	0	0		
NET EXPENDITURE (AFTER RESERVE CONTRIBUTIONS)	17,411	18,408	997	180	818		
FUNDING TOTAL	(17,411)	(17,431)	(20)	0	(20)		
FORECAST (UNDERSPEND) / OVERSPEND	0	977	977	180	798		

2024/25 Savings Progress

Directorate	Savings Title	Savings Detail	2024/25	£ Achieved	£ Not Achieved	Comments
Chief Executives	Audit Recharges to HRA	Review the HRA recharges to reflect the allocation of Audit days to HRA	(29,000)	(29,000)	0	
Chief Executives	Project External Consultancy	This was originally set aside for corporate project support but has not been used as project support has been factored into the business cases assessment process where needed. This will continue to be the case in future projects.	(20,000)	(20,000)	0	
Chief Executives	Emergency Planning	This is a highly unpredictable budget as it is difficult to predict emergency planning events, and as part of our Category 1 responder role we would be obliged to find any budget needed to support our communities in the event of a major incident. In quiet years the budget has not been spent historically.	(2,000)	(2,000)	0	
Chief Executives	Corporate Training	Central training budget saving	(15,000)	(15,000)	0	
Communities	Community Services	Increase pest control charges by 3% (7% inflation dealt with via fees and charges)	(500)	(500)	0	
Communities	Community Services	Set new port health charges to ensure full cost recovery (new port health regime to be introduced in April 2024 following EU exit)	(23,000)	(23,000)	0	
Communities	Community Services	LED Lighting installations on council car parks	(4,000)	(4,000)	0	
Communities	Community Services	Delete the Council's budget for the Free Tree Scheme. This would mean that the National Forest area will be the only part of the district benefiting from free trees fully funded by the National Forest Company	(9,000)	(9,000)	0	
Communities	Community Services	Increase the charge for any additional garden waste bins to align with charges across Leicestershire. Inflation of 7% will be applied to this charge through fees and charges. (total increase from £45 pa to £57pa)	(13,000)	(13,000)	0	
Communities	Community Services	No longer print and distribute annual waste collection calendars to every house in the district and instead promote Councils website. Savings amount to staff time, printing costs and travel costs which will all reduce carbon emissions	(15,000)	(15,000)	0	
Communities	Community Services	Reduce the Council's Community Grant Funding budget: Age UK £21,990 reduce by a third each year over three years to zero. Citizens Advice £62,000 to remain and Small Grants Scheme £19,500 to be reviewed in 2025/26 following implementation of community lottery scheme	(7,330)	(7,330)	0	
Communities	Community Services	Reduce the Council's contribution to the running of Ibstock Leisure Centre to Zero over three years. The grant in 23/24 is £15k	(5,000)	(5,000)	0	
Place	Planning Skills Grant	Planning Skills Grant (one-off) – bid to assist with validation of planning applications for urban design and conservation processes. Total grant £95k shown net of expenditure.	(3,155)	(3,155)	0	
Place	HS2 Consultancy	HS2 – budget for consultants no longer required	(25,000)	(25,000)	0	
Place	Closure of Council Offices	Council Offices Budget – to reflect closure of Whitwick Road Council offices	(67,600)	(67,600)	0	
Place	Town Centre WiFi	Town Centre Wifi – service provider has decided to withdraw from the market	(11,000)	(11,000)	0	
Place	Strategic Growth Plan	NWLDC contribution to work in connection with Strategic Growth Plan	(67,000)	(67,000)	0	
Communities	Housing Income	Charging policy for temporary accommodation	(5,000)	0	(5,000)	Demand still high in 2024/25 and proactive work to
Communities	Housing Income	New temporary accommodation provision	(70,000)	0	(70,000)	reduce costs did not commence until October 2024,
Communities	Housing	Reduction in temporary accommodation demand	(50,000)	0	(50,000)	leading to a delay in realised savings
Communities	Community Services	Back-office administration Cost Savings - various	(24,600)	0	(24,600)	Delay in fitness suite development, leading to a delay in signing new SLA. New SLA & savings now likely to be achieved in 25/26
Communities	Community Services	Adjust the budget to reflect the re-introduction of charges to use Ashby and Coalville public conveniences in early 2024 as well as operational savings as per the capital programme report approved at Full Council in September 2023	(27,000)	0	(27,000)	Decision reversed and MTFS amended
Resources	ICT	Resources to match demand and efficiencies from contracts	(51,800)	0	(51,800)	Savings not materialised and MTFS amended
Resources	ICT	Increase costs due to SAN Network less maintenance savings	(5,000)	0	(5,000)	Savings not materialised and MTFS amended
Total Budget Options			(549,985)	(316,585)	(233,400)	

Supplementary Estimates - General Fund, HRA & Special Expenses (Capital & Revenue)

Capital/Revenue	General Fund/HRA/ Special Expenses	Directorate	Service	Recurring/ One-Off	Amount £	Funded By	Reason For Request
Externally Funded							
Between £0 and £99,999 (For Information Only)							
Revenue	General Fund	Community Services	Community Services	One-Off	1,950	Grant	National Forest
Revenue	General Fund	Community Services	Strategic Housing	One-Off	56,000	Grant	Asylum Dispersal Scheme No. 7 Q3
Revenue	General Fund	Community Services	Strategic Housing	One-Off	27,347	Grant	Rough Sleeping Winter Pressures 24/25
Revenue	General Fund	Community Services	Strategic Housing	One-Off	23,386	Grant	Rough Sleeping Winter Pressures 24/25
Between £100,000 and £249,999 (For Cabinet Approval)							
Revenue	General Fund	Place	Planning & Infrastructure	One-Off	129,620	Grant	Building Safety Levy Grant S31
Revenue	General Fund	Community Services	Community Services	One-Off	114,152	Grant	Disabled Facilities Grant
Over £250,000 (Requires Council Approval)							
TOTAL EXTERNALLY FUNDED					352,455		
Council Funded							
Between £0 and £249,999 (For Cabinet Approval)							
Revenue	General Fund	Place	Property and Economic Regene	One-Off	10,000	Business Rates Reserve	Property Data System Officer
Revenue	General Fund	Resources	Finance	One-Off	1,275	MTFP Reserve	Review and update of Procurement system
Revenue	General Fund	Chief Executive	Legal & Support Services	One-Off	33,000	MTFP Reserve	Head of Legal Vacancy Agency backfill
Revenue	General Fund	Resources	Finance	One-Off	91,861	MTFP Reserve	Additional staffing to support with the finance system backlog
Revenue	General Fund	Community Services	Environmental Protection	One-Off	32,240	MTFP Reserve	Outdoor Market Setting up costs
Revenue	General Fund	Community Services	Community Services	One-Off	6,764	Business Rates Reserve	CCTV Storm Damage
Capital	General Fund	Place	Property and Economic Regene	One-Off	181,000	Business Rates Reserve	Marlborough Square Improvement Works
Over £250,000 (Requires Council Approval)							
TOTAL COUNCIL FUNDED					356,140		
TOTAL SUPPLEMENTARY ESTIMATES					708,595		

Section 106 Q3 2024/25 Position

Legal Agreements under Section 106 of the Town and Country Planning Act secure developer contributions to mitigate the impacts of the development on the local area. The District Council holds funds generated from legal agreements on behalf of the Council and third parties, such as the Healthcare bodies or the National Forest Company. The Council then holds those funds in an interest-bearing account until they are spent by the body responsible for implementing the requirements in the legal agreement which secured them.

The table below summarises the position at December 2024 for the various types of contributions included in agreements.

Type of Contribution	Provisional Opening Balance	Contributions Received	Contributions Paid to Third Parties	Closing Balance
River Mease - Available	6,924	0	0	6,924
River Mease - Retain	222,493	85,176	0	307,669
Air Quality	53,841	0	0	53,841
LCC	0	748,242	(748,242)	0
Police	82,569	117,673	(28,237)	172,005
Recreation/Play Areas/Leisure	724,998	0	(102,096)	622,902
Parish Councils	1,561	392,922	(392,922)	1,561
Affordable Housing	2,548,477	0	(149,500)	2,398,977
National Forest - Available	81,732	12,641	(80,992)	13,382
Healthcare	335,554	686,890	(21,362)	1,001,082
Highways	3,971,383	0	(2,445,211)	1,526,173
Network Rail	18,354	0	0	18,354
CCTV	12,400	0	0	12,400
Land & Open Space	100,772	0	(7,510)	93,262
	8,161,059	2,043,546	(3,976,072)	6,228,534

*River Mease monies are split in to two pots. Those in the 'Retain' pot is where payment has been made upon the grant of planning permission, but the requirement was for money to be paid at commencement of development. Therefore, until development commences this money cannot be used. If it was and the development did not start, the applicant would be able to reclaim the money.

North West Leicestershire District Council
Estimated Reserves as at 31st March 2025

Service Area	Provisional Balance as at 01/04/2024	Forecasted Movement (From)/To Reserves 2024/25	Forecasted Balance as at 31/03/2025
Chief Executive	334	(234)	100
Human Resources	30	0	30
Legal & Support Services	0	45	45
Community Services	933	(297)	636
Strategic Housing	404	0	404
Planning & Infrastructure	758	(16)	742
Property and Economic Regeneration	2,107	(74)	2,033
Joint Strategic Planning	142	39	181
Director of Resources	97	(27)	70
Customer Services	15	(3)	12
Business Change	106	442	548
ICT	0	0	0
Internal Audit	1	(1)	0
Finance	184	37	221
Service Earmarked Reserves	5,111	(89)	5,022
Business Rates	5,822	6,728	12,550
MTFP	7,588	(1,945)	5,643
Special Expenses	102	(90)	12
Total Earmarked Reserves	18,623	4,603	23,226
Unallocated			
General Fund	1,544	0	1,544
Special Expenses	61	0	61
Total Reserves - General Fund & Special Expenses	20,228	4,603	24,831

North West Leicestershire District Council
Capital Programme 2024/25 Quarter 3 Position

Scheme	Revised Budget	Actual Expenditure	Forecast Outturn	Variance	Slippage to 2025/26 / (overspend)
	£000	£000	£000	£000	£000
Active Programme					
Coalville Regeneration Projects	1,311	60	1,166	(145)	145
UK Shared Prosperity Fund Investment Plan Programme (UKSPF)	952	253	919	(33)	0
Carbon Zero	303	18	240	(63)	37
Systems/ICT Schemes	143	57	143	0	0
Vehicle, Plant and Equipment	3,345	552	716	(2,629)	2,615
New Construction or Renovation	219	311	356	137	(155)
TOTAL ACTIVE PROGRAMME	6,273	1,251	3,540	(2,733)	2,642
Development Pool					
Coalville Regeneration Projects	186	67	75	(111)	111
UK Shared Prosperity Fund Investment Plan Programme (UKSPF)	772	0	585	(187)	186
Carbon Zero	10	0	0	(10)	10
Systems/ICT Schemes	15	0	0	(15)	15
Vehicle, Plant and Equipment	2,256	0	0	(2,256)	2,256
New Construction or Renovation	13	0	0	(13)	13
Special Expenses	34	0	0	(34)	34
TOTAL DEVELOPMENT POOL	3,286	67	660	(2,626)	2,625
REFCUS					
Coalville Regeneration Projects	1,370	1,270	1,551	181	(180)
New Construction or Renovation	3,603	963	1,297	(2,306)	2,306
TOTAL REFCUS	4,973	2,233	2,848	(2,125)	2,126
TOTAL	14,532	3,551	7,048	(7,484)	7,393

Prudential Indicators Q3 2024/25

The Authority measures and manages its capital expenditure, borrowing and commercial investments with references to the following indicators.

It is now a requirement of the CIPFA Prudential Code that these are reported on a quarterly basis.

Capital Expenditure: The Authority has undertaken and is planning capital expenditure as summarised below.

	2023/24 forecast * (in millions £)	2024/25 forecast * (in millions £)	2025/26 budget (in millions £)	2026/27 budget (in millions £)
General Fund services	9.4	6.4	9.5	6.4
Council housing (HRA)	10.2	8.1	15.6	15.1

* 2023/24 and 2024/25 forecasts are based on the draft outturn position and may be subject to change

The main General Fund capital projects to date have included Marlborough Square Improvements £1.6m, Disabled Facility Grants (DFG) £0.6m, Kegworth Public Realm Works £0.7m and various UKSPF projects £1.0m. HRA capital expenditure is recorded separately and to date includes New Supply £2.0m, Home Improvement Projects £3.9m and Other HRA Projects £1.8m.

Capital Financing Requirement: The Authority's cumulative outstanding amount of debt finance is measured by the Capital Financing Requirement (CFR). This increases with new debt-financed capital expenditure and reduces with MRP (loans fund repayments) and capital receipts used to replace debt. The actual CFR is calculated on an annual basis.

	2023/24 forecast * (in millions £)	2024/25 forecast * (in millions £)	2025/26 budget (in millions £)	2026/27 budget (in millions £)
General Fund services	38.0	36.6	35.2	33.9
Council housing (HRA)	54.0	52.7	53.3	60.1
TOTAL CFR	92.0	89.3	88.6	94.0

* 2023/24 and 2024/25 forecasts are based on the draft outturn position and may be subject to change

Gross Debt and the Capital Financing Requirement: Statutory guidance is that debt should remain below the capital financing requirement, except in the short term. The Authority has complied and expects to continue to comply with this requirement in the medium term as is shown below.

	2023/24 forecast (in millions £)	2024/25 forecast (in millions £)	2025/26 budget (in millions £)	2026/27 budget (in millions £)	Debt at 31.12.2024 (in millions £)
Debt (incl. PFI & leases)	56.3	58.9	59.3	65.8	55.7
Capital Financing Requirement	92.0	89.3	88.6	94.0	

Debt and the Authorised Limit and Operational Boundary: The Authority is legally obliged to set an affordable borrowing limit (also termed the Authorised Limit for external debt) each year. In line with statutory guidance, a lower “operational boundary” is also set as a warning level should debt approach the limit.

	Maximum debt 2024/25	Debt at 31.12.24	2024/25 Authorised Limit	2024/25 Operational Boundary	Complied? Yes/No
Borrowing	56.3	55.7	99.5	89.5	Yes
PFI & Finance Leases	0.0	0.0	2.0	2.0	Yes
Total debt	56.3	55.7	101.5	91.5	Yes

Since the operational boundary is a management tool for in-year monitoring it is not significant if the boundary is breached on occasions due to variations in cash flow, and this is not counted as a compliance failure.

Proportion of Financing Costs to Net Revenue Stream: Although capital expenditure is not charged directly to the revenue budget, interest payable on loans and MRP / loans fund repayments are charged to revenue. The net annual charge is known as financing costs; this is compared to the net revenue

stream i.e. the amount funded from Council Tax, business rates and general government grants.

	2023/24 forecast*	2024/25 forecast*	2025/26 budget	2026/27 budget
<u>General Fund</u>				
Net Financing costs (£m)	1.8	1.6	1.9	1.8
Proportion of net revenue stream	10%	8%	10%	11%
<u>Housing Revenue Account</u>				
Net Financing costs (£m)	1.6	1.3	1.9	2.1
Proportion of net revenue stream	8%	6%	9%	9%

* 2023/24 and 2024/25 forecasts are based on the draft outturn position and may be subject to change

Special Expenses 2024/25 Q3 Monitoring & Forecast Outturn Position

COALVILLE SPECIAL EXPENSES	Approved Budget	Forecast Outturn	Variance
Parks, Recreation Grounds & Open Spaces	316,540	320,470	3,930
Broomley's Cemetery & Closed Cemetery	(2,350)	-330	2,020
Coalville in Bloom	5,000	5,000	0
Coalville Events	96,860	94,830	(2,030)
SPECIAL EXPENSES (NET COST OF SERVICE)	416,050	419,970	3,920
Service Management recharges/Admin Buildings	90,030	90,030	0
NET COST OF SERVICES AFTER RECHARGES	506,080	510,000	3,920
Contribution to/(from) Balances/Reserves	34,696	51,824	17,128
MET FROM GOVT GRANT & COUNCIL TAX (Budget Requirement)	540,776	561,824	21,048
FUNDED BY:			
Precept	(540,776)	(540,776)	0
Earmarked Reserve	0	(21,048)	(21,048)
	(540,776)	(561,824)	(21,048)

OTHER SPECIAL EXPENSES	Budget	Forecast Outturn	Variance
Whitwick	4,510	17,110	12,600
Hugglescote	9,790	4,050	(5,740)
Coleorton	2,310	1,950	(360)
Ravenstone	1,120	1,120	0
Measham	0	0	0
Lockington-Cum-Hemington	0	0	0
Oakthorpe & Donisthorpe	5,910	6,310	400
Stretton	0	0	0
Appleby Magna	0	0	0
OTHER SPECIAL EXPENSES (NET COST OF SERVICE)	23,640	30,540	6,900
Service Management recharges/Admin Buildings	28,900	28,900	0
NET COST OF SERVICES AFTER RECHARGES	52,540	59,440	6,900
Contribution to/(from) Balances/Reserves	3,631	5,507	1,876
MET FROM GOVT GRANT & COUNCIL TAX (Budget Requirement)	56,171	64,947	8,776
FUNDED BY:			
Precept	(56,171)	(56,171)	0
Earmarked Reserve	0	(8,776)	(8,776)
	(56,171)	(64,947)	(8,776)

2024/25 Special Expenses Earmarked Reserves

Reserve	Balances 01.04.24	Spend to date	Forecast Spend	Use of Reserves	Forecast Balance as at 31.03.25
<u>Coalville - Earmarked Reserve</u>					
Local Authority Parks Improvement Programme	15,714	0	15,714	0	0
	15,714	0	15,714	0	0
<u>Coalville - PPM Earmarked Reserve</u>					
Coalville Park - Refurbishment of disabled toilets	4,500	4,500	0	0	0
Scotlands Recreation - Repairs to potholes	4,054	600	1,000	0	2,454
Broomleys Cemetery - Path repairs (sealing)	7,130	2,795	0	0	4,335
Cropston drive play area - Replacement play equip	33,050	0	7,877	19,838	5,335
Sharpley Avenue play area - Replacement play equip	19,660	0	18,450	1,210	0
St. Faiths Rd play area - Removal/collection of rubber surface	900	900	0	0	0
	69,294	8,795	27,327	21,048	12,124
Total Coalville	85,008	8,795	43,041	21,048	12,124
<u>Hugglescote - PPM Earmarked Reserve</u>					
Cemetery - sealing pathways	15,450	6,674	0	8,776	0
Cemetery - new trees, remove stumps	2,000	0	2,000	0	0
Total Hugglescote	17,450	6,674	2,000	8,776	0
Total Earmarked Reserves	102,458	15,469	45,041	29,824	12,124

Treasury Management – Borrowing & Investments

Borrowing

Table 1 below shows the breakdown of the types of external borrowing held by the Council:

Table 1 – Borrowing summary.

	31.3.24 Balance £m	Net Movement £m	31.12.24 Balance £m	31.12.24 Weighted Average Rate %	31.12.24 Weighted Average Maturity (years)
Public Works Loan Board	52.4	-0.6	51.8	3.38%	13.9
Banks (LOBO)	0.0	0.0	0.0	0.00%	0.0
Banks (fixed-term)	3.9	0.0	3.9	4.74%	2.1
Local authorities (long-term)	0.0	0.0	0.0	0.00%	0.0
Local authorities (short-term)	0.0	0.0	0.0	0.00%	0.0
Total borrowing	56.3	-0.6	55.7	3.48%	16.0

Since the beginning of the reporting period the Council has paid £1.0m in interest on borrowing. The forecast amount to be spent on interest on loans for the financial year 24/25 in total is £1.95m. The overall interest rate on borrowing is 3.48%.

During the reporting period the Council has paid back £0.6m principal on its loans. It is forecasting to repay £1.26m in PWLB loan principal by the end of the year. £1.26m is for the annuity loans whereby regular payments are made throughout the lifetime of the loan. There is no intention to borrow to replace these loans as the Council currently has the resources to absorb this. The budget for borrowing principal repayments was in line to be met.

Investments

The breakdown of external investments held by the Council and movement since 31 December 2024 are shown in Table 2 below:

Table 2 – Investment summary.

	31.3.24 Balance £m	Net Movement £m	31.12.24 Balance £m	31.12.24 Income Return %	31.12.24 Weighted Average Maturity days
Banks & building societies (unsecured)	0.0	0.0	0.0	0.00%	0
Government (incl. local authorities)	30.0	-14.0	16.0	4.73%	24
Money Market Funds	0.0	25.0	25.0	4.73%	1
Total investments	30.0	11.0	41.0	4.73%	24

The Authority has budgeted £0.69m in interest income from investments after S106 deductions in 2024/25. Actual income received by 31st December 2024 was £1.05m. We are now forecasting the risk adjusted interest received by 31st March 2025 to be £1.367m and after S106 deductions income to be £1.093m. This will be split between the General Fund (GF) and Housing Revenue Account (HRA). This split will be 37.4% to the GF and 62.6% to HRA. The percentage split is worked using the investment balances for both funds throughout the year as a percentage of the overall investment fund

Interest forecasts are notoriously difficult to predict and are subject to change particularly in an unstable interest rate environment and constantly changing economic environment. These forecasts are likely to change again over the coming months as such an 80% risk adjustment is placed on anticipated income to avoid overreliance on interest return on budgets.

**NORTH WEST LEICESTERSHIRE DISTRICT COUNCIL
CABINET – TUESDAY, 25 MARCH 2025**



Title of Report	QUARTER 3 HOUSING REVENUE ACCOUNT FINANCE UPDATE	
Presented by	Councillor Andrew Woodman Housing, Property and Customer Services Portfolio Holder <div style="text-align: right;">PH Briefed <input type="checkbox"/> N</div>	
Background Papers	Council 22 February 2024: Housing Revenue Account (HRA) Budget and Rent Setting 2024/25	Public Report: Yes
	Cabinet 9 January 2025: 2024/25 Quarter 2 Housing Revenue Account (HRA) Finance Update	Key Decision: Yes
Financial Implications	Any financial implications of this report are detailed in the body of the report and the attached appendices.	
	Signed off by the Section 151 Officer: Yes	
Legal Implications	No legal implications arising from this report.	
	Signed off by the Monitoring Officer: Yes	
Staffing and Corporate Implications	Any staffing implications of this report are detailed in the body of the report and the attached appendices.	
	Signed off by the Head of Paid Service: Yes	
Purpose of Report	To provide Cabinet with an update on the financial position on the Housing Revenue Account as at Quarter 3 2024/25.	
Reason for Decision	Cabinet is responsible for making all of the necessary arrangements to ensure that the priorities identified by the Council are delivered within the Budget and Policy Framework and therefore financial reporting is brought to Cabinet to ensure that oversight is carried out. To update Cabinet on Quarter 3 2024/25 and request approval for supplementary estimates as detailed in the recommendations below.	

Recommendations	THAT CABINET: <ol style="list-style-type: none"> 1. NOTES THE FORECAST UNDERSPEND ON THE HOUSING REVENUE ACCOUNT 2024/25 OF £1,653K BASED ON QUARTER 3 INFORMATION. 2. NOTES THE REVISED HOUSING CAPITAL FORECAST DETAILED IN APPENDIX 2.
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1.0 PURPOSE OF THE REPORT

- 1.1 To inform Members of the spending position for the period 1 April 2024 to 31 December 2024 for the Council's Housing Revenue Account (HRA) focusing on the significant variances from the approved budgets. It should be noted that due to the subsequent backlog issues from the finance system implementation and the delay to closing the 2023/24 accounts, the in-depth analysis of the figures which would usually be undertaken has not been possible. Therefore, the focus has been on reporting the major variances based on the information available and discussions between Finance and the budget holders.
- 1.2 To update Members on the HRA capital programme for the period 1 April 2024 to 31 December 2024 on the proposed resourcing of the capital programme and the level of Council capital resources available, including capital receipts.
- 1.3 To update Members on the changes to the capital programme and note the variations to scheme budgets and re-profiling of budgets to future years.

2.0 HOUSING REVENUE ACCOUNT

2.1 HRA Income and Expenditure

- 2.1.1 Table 1 below shows the summary income and expenditure forecast outturn and variance for the HRA which is currently forecasting an underspend position at the end of quarter three of £1,653k.

Table 1 – HRA 2024/25 Quarter 3 Forecast Outturn Position

	Budget £'000	Forecast £'000	Variance £'000
Income	(21,038)	(21,627)	(589)
Operating Expenditure	19,651	18,589	(1,064)
Operating (surplus)/deficit	(1,387)	(3,035)	(1,653)
Appropriations	4,005	4,005	0
Net (surplus)/deficit	2,618	967	(1,653)

- 2.1.1 More detailed information is shown at Appendix 1.

2.1.2 The Council continues to work actively to improve services delivered by the HRA and ensure the impact on tenants is considered in all service delivery. Work on this so far has included:

- Commissioning an independent review of processes.
- Using contractors to assist in delivering against repairs backlogs.
- Working on reconfiguration of IT systems to improve efficiency and facilitate improved processes.
- Recruiting staff to key vacant roles.
- Preparing a plan for further actions within the service.

2.1.3 Variances include:

- £101k underspend on staffing relating to supervision and management and a further £551k forecast underspend in respect of repairs and maintenance respectively. This is due to several vacant posts that are difficult to fill across the service.
- £589k more income expected than budgeted in respect of rent and service charges, this is mainly due to less void properties than budgeted.
- Improvement in expected investment income of £412k due to favourable interest rates.
- £2m has been earmarked to make provision for voids work that will not be completed in this financial year. This is mainly due to the contractors, Wates' not being able to commence the backlog of void works until October 2024. Hence the expenditure relating to previous years would not impact future years budget.

2.2 HRA Reserves

2.2.1 The total HRA reserve balances provisionally have a balance of £18.8m. A minimum balance of £1.0m, this being the HRA General Balance, is maintained to ensure the HRA has sufficient funding to cover unforeseen revenue expenditure. There is a further £2.1m in Earmarked Reserves and the remaining £15.6m to be used for capital projects and for the repayment of debt.

2.2.2 Table 2 below shows a summary of usable HRA reserves:

Table 2 – HRA Usable Reserves forecast 2024/25

Reserve name	Provisional Balance at 31/03/24 £000	24/25 contributions received £000	24/25 Spend £000	Transfers between reserves £000	Balance at 31/03/25 £000
HRA Earmarked Reserves	115	2,000	0	0	2,115
HRA General Balance	2,688	2,415	(1,513)	(2,492)	1,098
	2,803	4,415	(1,513)	(2,492)	3,213
HRA Capital Receipts	6,575	0	0	0	6,575
Major Repairs Reserve	2,840	0	0	0	2,840
HRA Debt Repayment Reserve	3,726	0	0	2,492	6,218
Total	15,943	4,415	(1,513)	0	18,846

2.2.1 HOUSING REVENUE ACCOUNT CAPITAL PROGRAMME

2.2.2 The 2024/25 Revised Budget for the Housing Revenue Account (HRA) capital is £15.925m and actual spend to the end of quarter three (December 2024) is £2.170m (13.6%) of the budget. The forecast outturn position is £8.061m representing 50.6% of the budget with a further £7.864m, which is 49.4% of the revised budget, is forecast to slip into future years.

2.2.3 Table 3 shows the expenditure and forecast against budget as at quarter three.

Table 3 - Quarter 3 2024/2025 Outturn on the HRA Capital Programme

Scheme	Original Budget	Prior Year C/fwd	Revised Budget	Actual	Forecast	Variance (Revised Budget v Forecast)
	£'000	£'000	£'000	£'000	£'000	£'000
Home Improvement	10,425	0	10,425	258	3,891	(6,534)
New Supply	3,400	0	3,400	52	1,980	(1,420)
Estate Improvements	670	0	670	421	440	(230)
Other HRA Capital Projects	1,430	0	1,430	1,439	1,750	320
Total	15,925	0	15,925	2,170	8,061	(7,864)

2.2.4 The housing capital programme broadly consists of the Home and Estate Improvements Programme as well as the New Supply Programme.

2.2.5 The Home and Estate Improvement Programme and Other Housing Capital Projects

The Home and Estate Improvement Programme includes a range of works including:

- Undertaking vital fire safety works.
- Undertaking major aids and adaptation works around safety, accessibility and increasing independent living for residents.
- Transforming older persons schemes to an integrated digital service, giving full and timely works, events and visits information to residents. This also allows the Council to share a digital layout with the Fire Service so in the event of an incident they can guide crews through the building.
- Replacing heating schemes, installing new Ideal Logic (hydrogen ready) efficient boilers or air source heat pumps (if replacing solid fuel systems) and correct insulation to improve thermal efficiency of Council homes. This will improve affordability of heating for tenants this winter as well as assisting the Council in achieving progress towards every property meeting Energy Performance Certificate Level C by 2028.
- Undertaking estate improvement programme of works which includes off street parking and footpaths and unadopted roads works

2.2.6 New Supply Scheme

- The New Supply Scheme with a revised budget of £3.400m, is forecasting an outturn position of £1.980m, representing 58.2% of the budget. The actual spend to the end of quarter 3 is £0.052m, 1.5% of the budget and £1.420m (41.8%) of the budget will slip into future years.
- Even though the spend to date is very low, there are three open market purchases totalling £0.798m which are due to be completed this financial year. In addition, £1.182m is allocated to purchases of new homes from another registered provider which should see the properties completed in February/March 2025 with transfer completing before the end of March 2025.

Changes to the QL Housing and Repairs data system mean the Council will be recording in more detail and in real-time what budgets are being spent, when, and where. This system is in the process of being integrated with the Unit4 Finance system so that weekly reconciliation of forecast and actual budgets can be undertaken. Where programmes fall behind in delivery, adjustments can be made to ensure the Council delivers what it promises or communicates and takes action to intervene.

Table 4 - Reprofiting of Future Years' Budgets

Scheme	Reprofiled to 2025/26	Reprofiled to 2026/27	Reprofiled to 2027/28	Total
	£'000	£'000	£'000	£'000
Home Improvement	6,534	0	0	6,534
New Supply	1,420	0	0	1,420
Estate Improvements	0	0	0	0
Other HRA Capital Projects	0	0	0	0
Total	7,954	0	0	7,954

2.2.7 The Home Improvements and New Supply has the largest budget allocation to future years and this is to undertake projects such as, asbestos remediation, boilers and zero-carbon schemes

2.2.8 It should be noted the table shows the re-profiling of expenditure from the budget agreed in February 2024, the reprofiling will need to be reported to Cabinet as part of the Outturn Report 2024/25.

Policies and other considerations, as appropriate	
Council Priorities:	The spending from the budget provides funding for the Council to deliver against all its priorities.
Policy Considerations:	None
Safeguarding:	None
Equalities/Diversity:	None
Customer Impact:	None
Economic and Social Impact:	None
Environment and Climate Change:	The Council is forecast to invest £800k on Zero Carbon Home Improvements.
Consultation/Community/Tenant Engagement:	None
Risks:	<p>Although inflation has decreased, the impact of the high inflation means the real purchasing power of the Council's reserves steadily erodes, meaning the same amount of money can purchase progressively fewer goods and services. This erosion of value poses a challenge to the organisation's ability to maintain financial stability and achieve its long-term financial objectives.</p> <p>Real returns (i.e. after inflation) are and have been negative despite investment returns rising. So even</p>

	<p>if the Council changed its policy to add interest earnings to reserves it still would not solve the whole problem. Indeed, very few investment returns are beating inflation and in general if you wanted higher returns the Council would need to invest for a longer period and/or with riskier assets. This is not something the Council has decided to do.</p> <p>The budgets will continue to be monitored throughout the year to ensure that Council expenditure remains within its funding envelope.</p> <p>Work is still required between now and the end of the year to ensure the ledger is up to date for 2023/24 and 2024/25. As the 2023/24 data is yet to be finalised, this places risk on the 2024/25 data and any brought forward balances from 2023/24.</p>
Officer Contact	<p>Anna Crouch Head of Finance and Deputy S151 Officer anna.crouch@nwleicestershire.gov.uk</p>

2024/25 HRA QUARTER 3 FORECAST OUTTURN POSITION

	Revised Budget	Forecast	Variance	Comments
EXPENDITURE				
Repairs and Maintenance	10,067	9,517	(551)	The underspend is due to hard to fill vacancies across the service, measures continue to be put in place to address this.
Supervision and Management	3,707	3,606	(101)	The underspend is due to hard to fill vacancies across the service, measures continue to be put in place to address this.
CAPITAL CHARGES				
Depreciation	4,162	4,162	0	
Debt Management Expenses	3	3	0	
Provision for Doubtful Debts	100	100	0	
Capital Financing and Debt Management	1,899	1,899	0	
Investment Income	(286)	(698)	(412)	Investment income is higher than anticipated due to improved returns
	5,878	5,466	(412)	
TOTAL EXPENDITURE	19,652	18,589	(1,064)	
INCOME				
Rent and Service Charges	(20,979)	(21,568)	(589)	Higher than budgeted rent income mainly due to less void properties than anticipated
Non-Dwelling Rents	(46)	(46)	0	
Garages & Sites	0	0	0	
Other Income	(13)	(13)	0	
TOTAL INCOME	(21,038)	(21,627)	(589)	
NET COST OF SERVICES	(1,386)	(3,038.000)	(1,653)	
APPROPRIATIONS				
Transfer to/from reserves	2,492	2,492.000	0	
Revenue Contribution to Capital	1,513	1,513.000	0	
	4,005	4,005.000	0	
NET (SURPLUS)/DEFICIT	2,619	967	(1,653)	

**North West Leicestershire District Council
HRA Capital Programme 2024/25 Quarter 3**

Scheme	Original Budget	Revised Budget	Forecast Outturn	Variance	Reprofiled to 2025/26
	£'000	£'000	£'000	£'000	£'000
Home Improvement					
Home Improvement Programme	6,500	6,500	2,500	(4,000)	4,000
Asbestos	400	400	15	(385)	385
Roofs	550	550	0	(550)	550
Commercial Boilers	150	150	140	(10)	10
Stock Condition Surveys	325	325	436	111	(111)
Zero Carbon	2,500	2,500	800	(1,700)	1,700
New Supply	3,400	3,400	1,980	(1,420)	1,420
Estate Improvements/Assets Management					
Off Street Parking	300	300	330	30	0
Footpaths and Unadopted Roads	100	100	60	(40)	0
Garage demolition and replacement	70	70	20	(50)	0
Estate Projects - other	200	200	30	(170)	0
Other HRA Capital Projects					
Sheltered Housing Improvements	350	350	0	(350)	0
Passive Fire Safety	300	300	600	300	0
Scheme Lighting	250	250	0	(250)	0
Tunstall System	30	30	280	250	0
Major housing Aids and Adaptations	400	400	430	30	0
Housing Management IT System (AIP)	100	100	91	(9)	0
Capital Works - Voids	0	0	350	350	0
Total	15,925	15,925	8,061	(7,864)	7,954

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NORTH WEST LEICESTERSHIRE DISTRICT COUNCIL

CORPORATE SCRUTINY COMMITTEE – THURSDAY, 19
JUNE 2025

Title of Report	CUSTOMER SERVICES ANNUAL REPORT 2024/25	
Presented by	Nichola Oliver Customer Services Team Manager	
Background Papers	Customer Service Scrutiny report 2024 Customer Experience Strategy 2022 -2025	Public Report: Yes
Financial Implications	There are no financial implications arising from this report.	
	Signed off by the Section 151 Officer: Yes	
Legal Implications	None directly arising from this report.	
	Signed off by the Monitoring Officer: Yes	
Staffing and Corporate Implications	None bar those addressed in the day-to-day management of the service.	
	Signed off by the Head of Paid Service: Yes	
Purpose of Report	<p>This report is presented to the Committee as part of the agreed annual update on Customer Service performance.</p> <p>The report supports the Council's goals outlined in the Corporate Delivery Plan to prioritise customer focus. It recognises that Customer Service enquiries offer a consistent and valuable source of feedback from residents, helping the Council to identify areas of success and opportunities for improvement.</p>	
Recommendations	THAT CORPORATE SCRUTINY COMMITTEE PROVIDES COMMENTS FOR CABINET TO CONSIDER AT ITS MEETING ON THE 29 JULY.	

1.0 BACKGROUND

- 1.1 This report has come before the Committee following an agreement by the Committee in December 2022 to add an update report to the work programme on an annual basis. The scoping request previously was for the item to be focused on the overall levels of

performance, the performance metrics used and what action has and is planned to be taken to address any areas of concerns.

- 1.2 This report provides a comprehensive overview of the Council's efforts to enhance customer satisfaction and responsiveness. It summarises key metrics and trends observed over the financial year 2024/25, highlighting areas of success and identifying opportunities for improvement. The report includes detailed analysis of customer feedback, response times, and resolution rates, offering valuable insights into how the Council can continue to improve its services and better meet the needs of its residents.

2.0 POLICY & STRATEGY FRAMEWORK

- 2.0 The adopted Customer Experience Strategy 2022-2025 sets the context for the consideration of Customer Service and its operation in the Council. The Strategy will be refreshed in 2025.

- 2.1 In summary, the Strategy makes several key statements which provide the policy context for this report. These are that:

- I. effective management of a customer relationship is not only about how responsive, efficient and technologically advanced services are, but is equally about the emotion, feeling and impression that an individual experiences.
- II. the Strategy starts the journey of the Council moving away from a view that customer service is the responsibility of a team or department, but instead recognises that it is a cross-cutting theme that spans the whole organisation and links intrinsically with our wider plans, behaviours and values.
- III. it emphasises the importance of digital experience, both to meet customer demand (and often preference), fits our future resources, but also to free up resources to help those who need more of our help, or need to access our services in different ways
- IV. it begins the movement of the Council to one of customers being at the heart of what we do.

- 2.2 The Strategy also outlines a set of principles that the development of customer service (in all areas of the Council) will draw upon:

- Customer First: Placing customers at the heart of the organisation. Empowering our staff to provide their absolute best customer experience in a way that customers tell us that they want to.
- Customer Access: A modern, fresh approach to customer experience and spaces, whether physical or digital. Light, clean and welcoming environments.
- Digital by Default: Digital experiences so good that they are the channel of choice.
- Inclusion: Recognising our customers' unique circumstances and in doing so ensuring that those that need our services are not excluded.
- Customer Insight: Consistently measuring our customer experiences. Knowing our customers and their needs. Understanding why things go wrong and learning from this to improve our services.
- Value for Money, Efficiency and Return on Investment: Recognising the financial climate, benefit focused outcomes and business minded decision making.

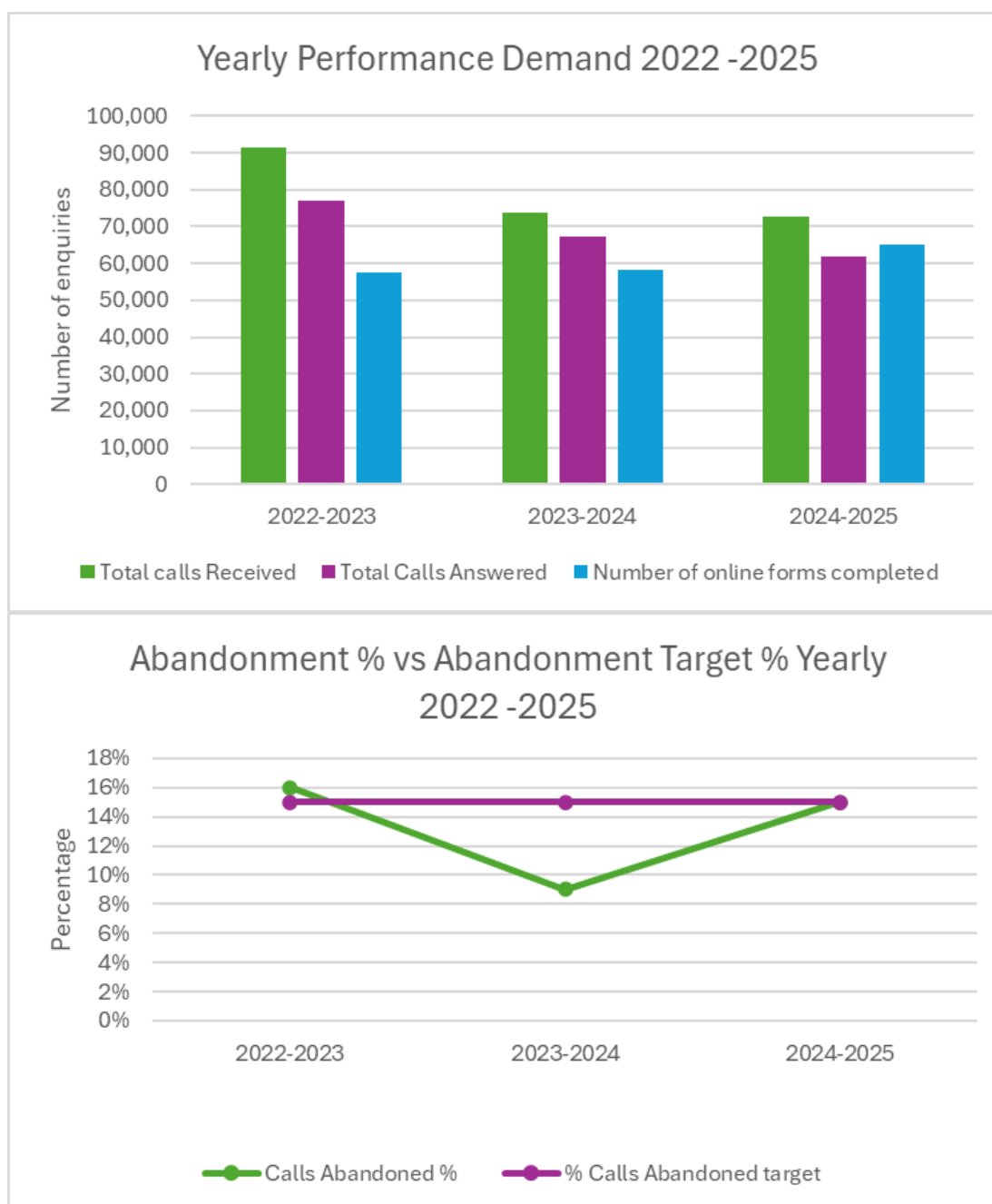
- 2.3 These principles are driving the changes to customer provision up to 2025.

3.0 CUSTOMER SERVICE DELIVERY

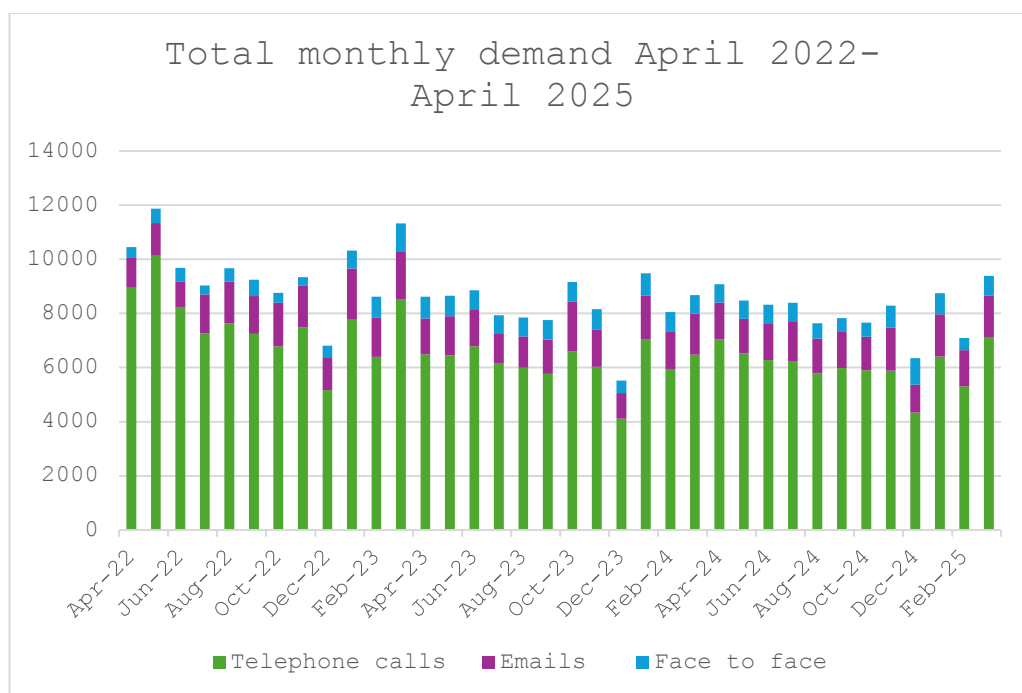
3.1 When discussing customer service provision, it is essential to recognise that this involves more than just the Customer Services Team, although they play a crucial role. All Council staff contribute to customer service in various capacities. While this report focuses on the performance of the Customer Services Team, below is a summary of the primary areas with significant customer interaction. It is important to note that every department within the Council engages with customers to some extent:

- Customer Services – this is the main front-line support providing the front-end contact for many Council services with much of the initial customer contact coming through this team either face-to-face or by phone and email.
- The Customer Experience Team – this team is responsible for capturing, analysing, and acting upon customer feedback, data, and insights at every stage of the customer journey. They share this valuable information with the other services to foster continuous improvement. Collaborating with back-office teams, they work to enhance the customer journey and improve services for both customers and the Council. This team also includes the Council's Feedback Officer, who administers and manages all corporate feedback, including complaints and member enquiries.
- Housing Repairs Team - This team handles initial calls from tenants reporting or following up on both responsive and planned works.
- Housing Choices – This team manages initial calls from customers seeking social housing, whether due to homelessness or a desire to join the choice-based lettings register.
- Waste services – Calls related to waste services are initially answered by the Customer Services Team, aiming for resolution at the first point of contact. These calls include missed bin reports, requests for new or additional waste containers, bulky waste collections, collection advice, and promotion of waste services and initiatives. Calls may be transferred to the Waste Team if escalation is needed or if the Customer Services Team cannot resolve the enquiry.
- Planning - Calls regarding planning are answered by the Customer Services Team, with the goal of resolving them at the first point of contact or directing callers to appropriate digital forms or resources. Calls requiring specific officers or related to certain applications are transferred to the Planning Support Team.
- Revenues and Benefits - being only the second team that touches every household within the district through Council Tax and therefore forms a considerable proportion of the Council's calls each year. These calls are answered by the Customer Services Team with the aim to resolve them at the first point of contact. Calls may be transferred to the Revenues or Benefits team if the enquiry needs escalation or customer services is unable to answer the question presented.

4.0 PERFORMANCE DATA

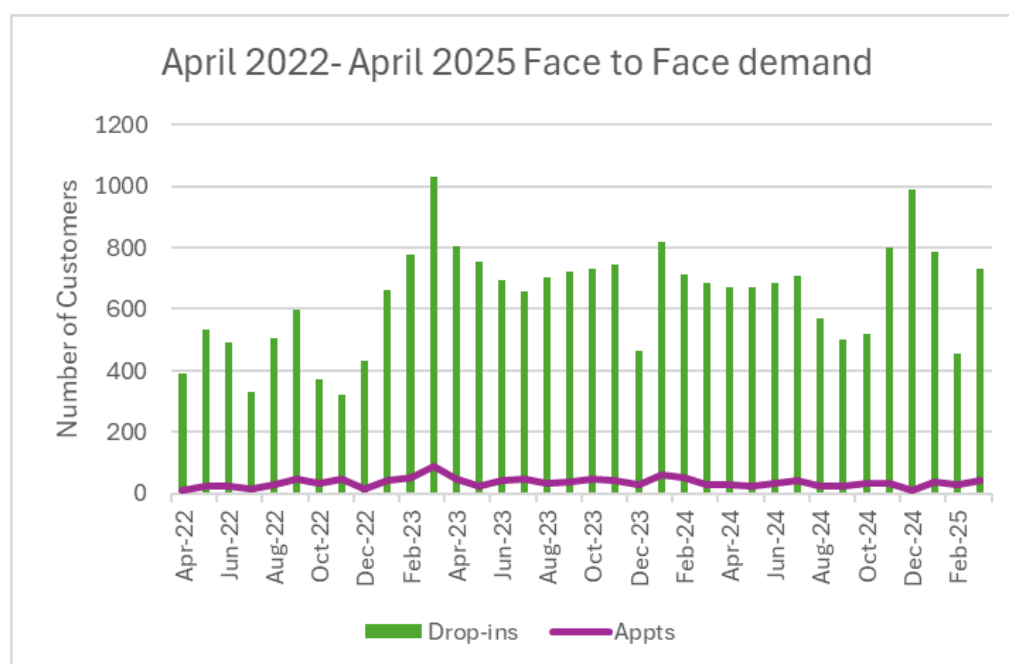


- 4.1 In 2024/25, the number of calls received by Customer Services marginally decreased by 1,031. This reduction may be attributed to several factors, including changes in how residents choose to access services. Despite the decrease in calls, the overall number of interactions remains consistent with an increase in those residents choosing to access our online forms. Customer Services now handle more enquiries at the first point of contact, suggesting that the calls are from more unique callers rather than repeat callers. Consequently, the total number of calls is now a more accurate reflection of the number of enquiries.

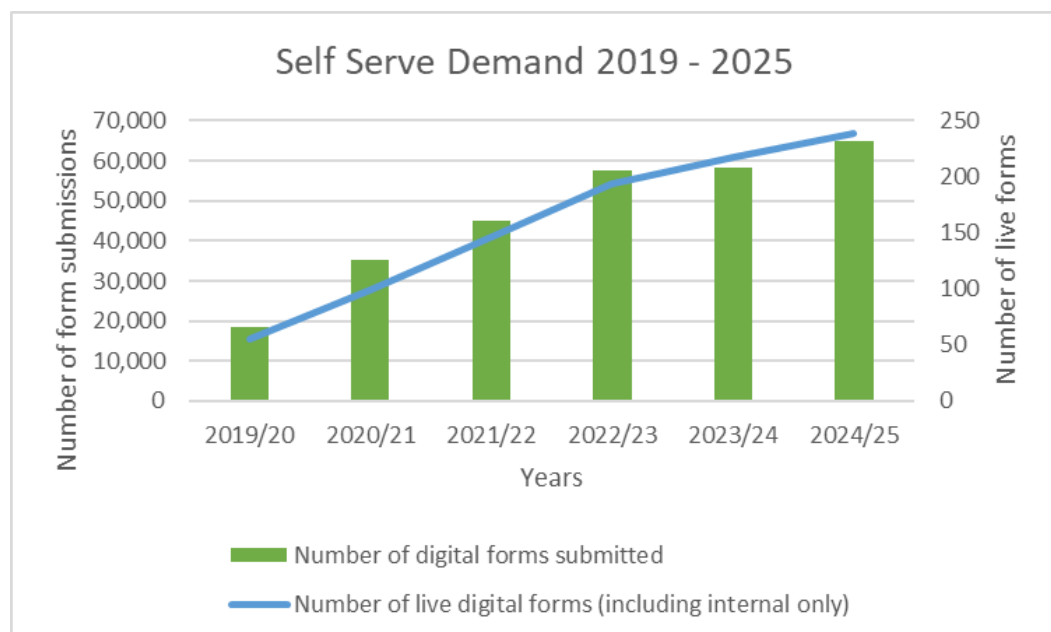


- 4.2 Since the opening of the Customer Centre in December 2023, the Council observed an initial peak in face-to-face interactions, with a significant increase in the number of residents 'dropping in' compared to the previous year. This surge was anticipated due to the Centre's more accessible location. The number of face-to-face interactions has now stabilised in the last financial year, averaging 674 residents per month. These enquiries tend to be more in-depth and are often from residents with more complex needs.

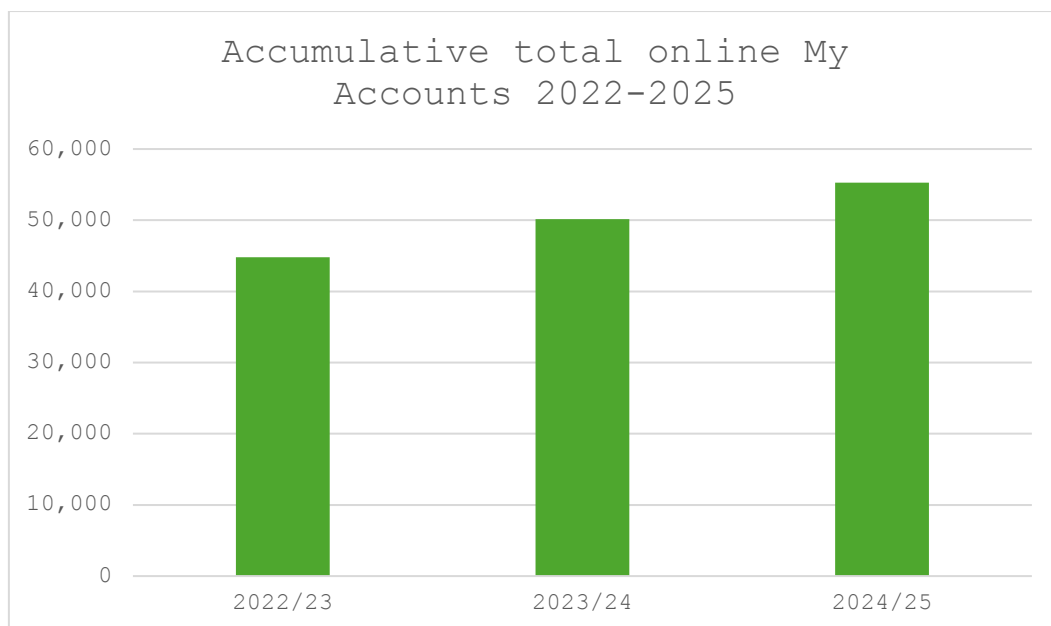
The Customer Centre also provides an excellent opportunity to inform attendees about digital service options for future use, where applicable.



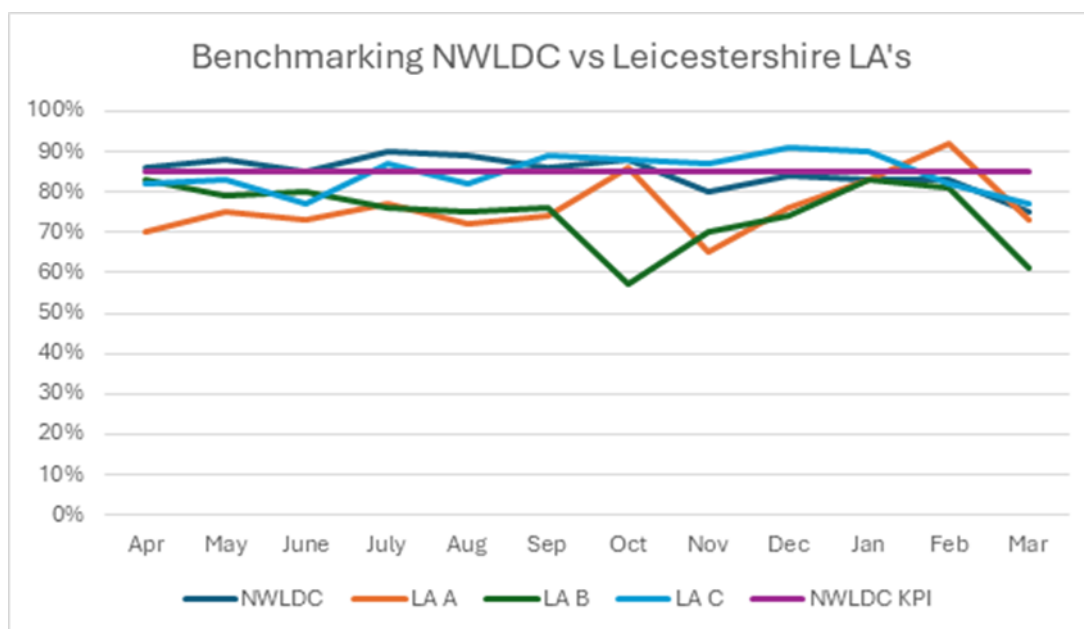
- 4.3 In 2024/25, call handling times remained higher than in previous years, averaging six minutes and one second per call. This increase is expected due to the rise in digital self-service demand, leaving the remaining enquiries more detailed and time-consuming. Consequently, the routine enquiries officers now receive are more complex and often involve assisting more vulnerable residents. As a result, call handling times have increased, leading to longer wait times and a higher number of abandoned calls.
- 4.4 Over the past six years, the availability of the Council's digital online self-service platform has significantly increased. By 2024/25, there were 238 forms available across various service areas for both internal use and customer access compared to 55 in 2019/20. This growth was initially driven by the demands of Covid-19, but more broadly, services have been progressively working to provide digital solutions and utilise online forms to enhance service accessibility for customers. As illustrated below, the number of customers accessing this digital channel has also increased over the last six years, in line with the rise in available digital forms.



- 4.5 Over the past three years, the number of residents choosing to create online accounts to view their personal data, such as Council Tax and benefits, has steadily increased. As of the end of March 2025, there are 55,290 registered 'My Accounts'.



- 4.6 Out of the 238 live online forms, 77 of these are fully integrated end to end processes for example missed bin collection and fly tipping, over the last year it is estimated that there has been an average time saving of 34 hours per week.
- 4.7 Benchmarking abandonment call rates against other local authorities within Leicestershire, (see below), shows that the Council is performing relatively the same as one local authority and better than two others. The purple straight line shows the target for abandoned calls within customer services.

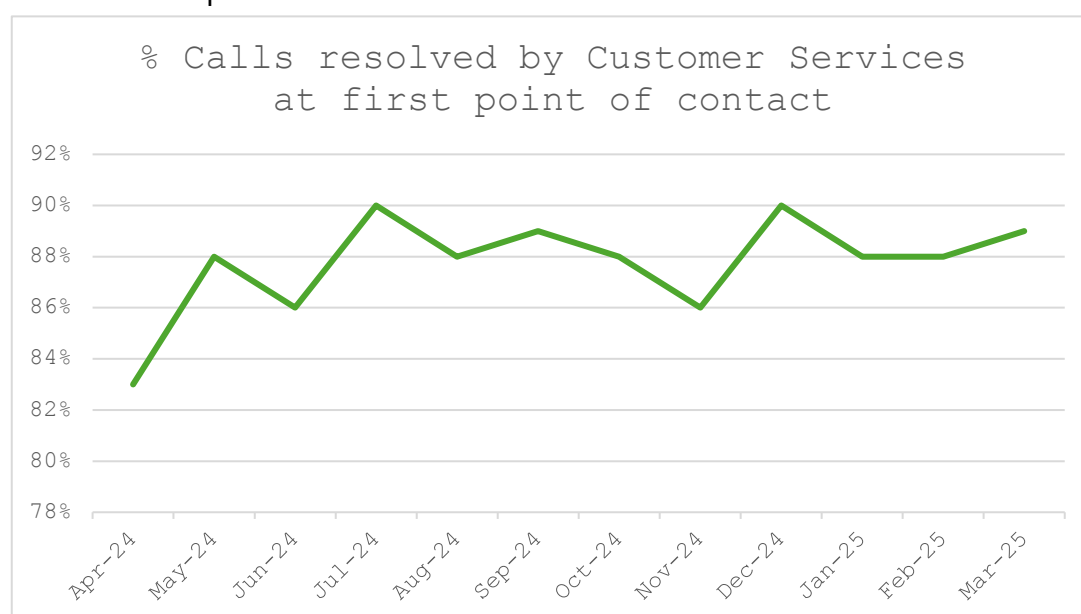


- 4.8 Benchmarking against other local authorities has shown a move away from traditional Key Performance Indicators (KPIs) of calls answered within 60 seconds and 90% call answering, and instead working towards calls being dealt with right first time and taking a holistic approach to how the Council deals with enquiries. For example, if the customer is calling regarding a Council Tax reminder –

- are they getting the right benefits
- do they have other debts and
- need referring for debt advice.

This is the approach the Council is taking and has been recording resolution within Customer Services for the last year.

- 4.9 In April 2024, the Customer Services team started recording call resolution as to whether a call had been resolved by the Customer Services team or if it needed to be passed on to a back-office service to completed. The Council set a target of 85% per month by benchmarking against other Leicestershire local authorities. Over the past year, the Council has consistently exceeded this target, achieving an average of 88% first point contact resolution per month.

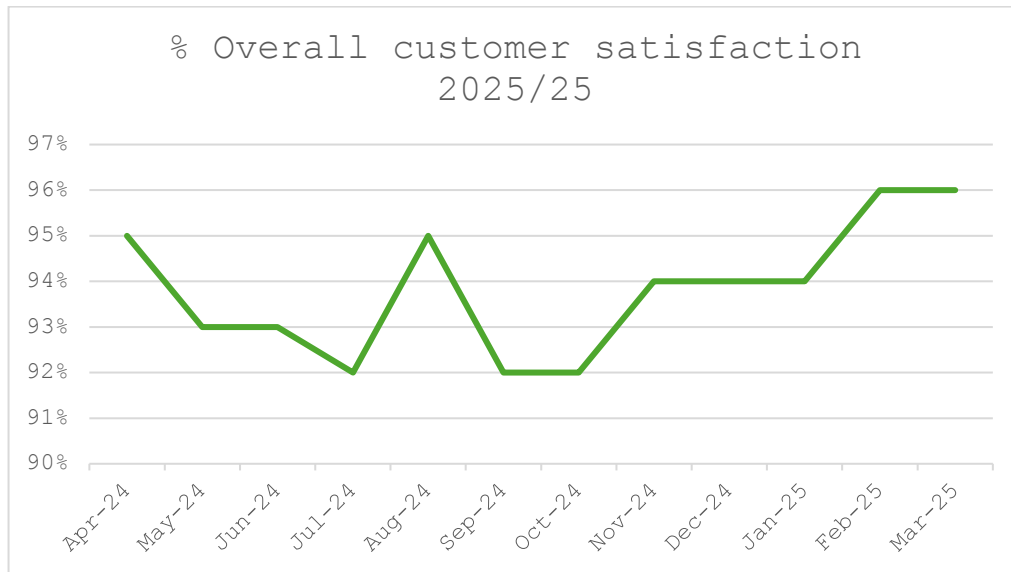


5.0 Customer Satisfaction

- 5.1 Customer satisfaction is a critical aspect of the Council's operations, as it directly impacts the effectiveness and efficiency of service delivery. By capturing customer satisfaction, the Council can gain valuable insights from residents' feedback, which helps identify areas of success and opportunities for improvement. High levels of satisfaction foster trust and confidence in the Council, enhancing its reputation and encouraging community engagement. The graph below shows the overall customer satisfaction results for the last year, out of the 3824 customers who completed the telephone survey.

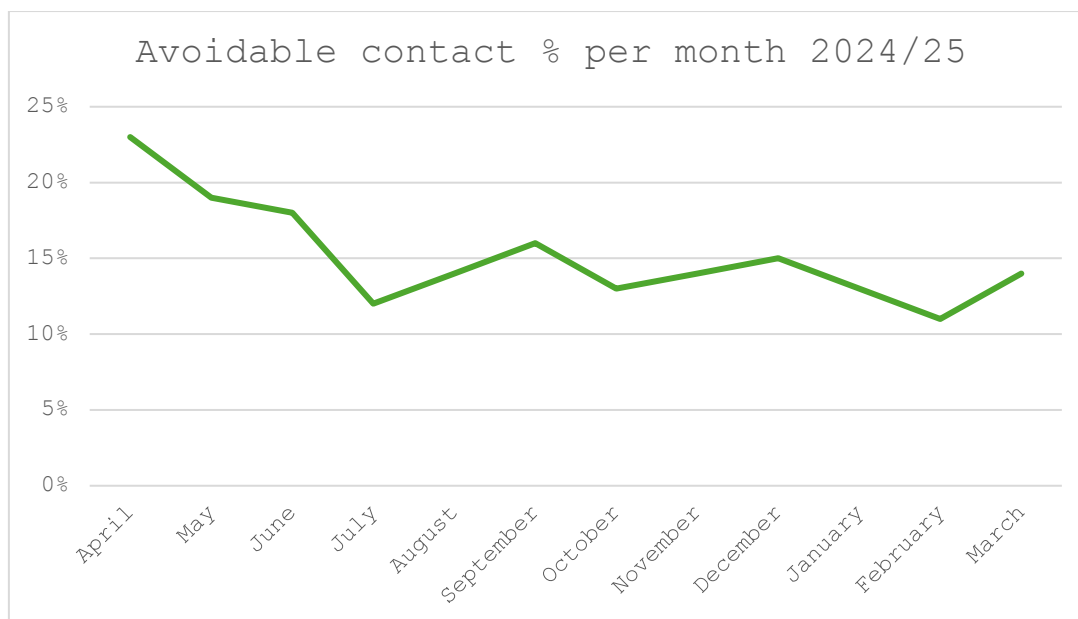
- 5.2 The Council achieved an average satisfaction rate of 94% for the year 2024/25. This performance is notably higher compared to a comparable local authority in Leicestershire, referred to as 'Local Authority A'.

In terms of survey participation, the Council had a higher engagement, with 3,824 customers completing the survey, compared to 2,841 customers for 'Local Authority A'. Furthermore, 'Local Authority A' reported an average satisfaction score of 85.40%, which is significantly lower than the Council's 94%. These results indicate that the Council is performing well in terms of customer satisfaction and survey participation within Customer Services.

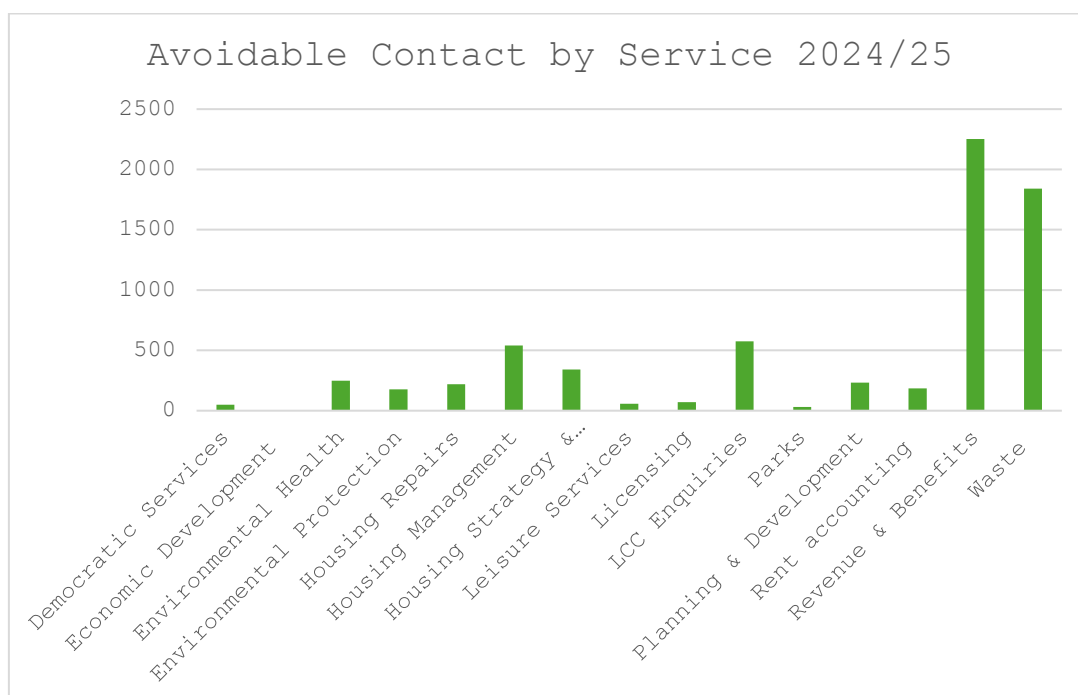


6.0 Avoidable Contact

- 6.1 Avoidable Contact in the context of customer service and the Council operations, refers to interactions between customers (or residents) and the Council that could have been prevented through better information, processes, systems and officer behaviour. These contacts often arise due to issues such as unclear communication, process inefficiencies, or lack of accessible information.
- 6.2 The data analysed spans from 1 April 2024 to 31 March 2025, marking the first full year of recording avoidable contact. Contacts are categorised based on their resolution status as documented by the Customer Service team. It is important to note that this data focuses solely on avoidable contact received into the Customer Service team and does not account for avoidable contact occurring elsewhere within the Council.
- 6.3 The graph below shows the percentage of avoidable contact received by the Customer Service contact centre each month. Over the course of the year, this averages out to 15% of all contact, which translates to approximately 785 calls per month at an average of five minutes 51 seconds per call. This baseline provides the Council with a foundation to understand and work towards reducing avoidable contact.



6.4 The graph below illustrates the number of avoidable contacts across various Council services between April 2024 and March 2025. Notably, Revenues and Benefits and Waste services have the highest number of avoidable contacts, with 2,252 and 1,841 contacts respectively. This is expected, as these two services directly reach every household, providing a broader perspective on their impact.



6.5 As part of a transformation project aimed at improving customer contact, the Council is collaborating with various services to reduce avoidable contact. This involves reviewing the corporate customer contact standards, conducting root cause analysis to understand recurring issues, and assessing the content and quality of the Council's website. Additionally, the Council is examining the letters it sends to ensure they are written in plain English, with the ultimate goal of enhancing customer understanding.

7.0 Recent challenges, achievements and improvements

- 7.1 Over the past year, Customer Services has experienced a notable increase in abusive and threatening behavior from customers, both in person and via telephone. Additionally, there has been a rise in the number of customers exhibiting mental health challenges, significantly impacting the Customer Services team.

To address these issues, the Council is implementing several strategies:

- **Enhanced No Tolerance Messaging:** The team is reinforcing its stance against abusive behaviour through increased communication and signage.
- **Root Cause Analysis:** The team is investigating the underlying reasons for these behaviours to prevent future occurrences.
- **Review of Customer Contact Standards:** The team is ensuring our standards are consistent and aligned across the organisation, setting clear expectations for both staff and customers.

These challenges have also affected the health and wellbeing of the Customer Service team, leading to increased sickness and reduced capacity. In response, the Council is exploring various training options focused on staff wellbeing.

- 7.2 Customer Services successfully retained their customer service accreditation, which rigorously tests areas identified as priorities for customers. These areas include delivery, timeliness, information, professionalism and staff attitude. The accreditation also emphasises developing customer insight, understanding the user experience and robustly measuring service satisfaction. To achieve this accreditation, full compliance in at least 46 out of 57 elements is required, with the opportunity to demonstrate exceptional performance at a "compliance plus" level. Customer Services achieved full compliance in all elements and excelled in four "compliance plus" areas.
- 7.3 The Council has implemented a 'secret shopper' survey within Customer Services to gain external perspectives and feedback on customer interactions. This feedback is crucial for informing improvements in how the Council serves its customers. The survey focuses on key elements such as listening, understanding, empathy, enthusiasm, rapport building, clear communication and overall customer experience. The average score from these surveys is an impressive 90%.
- 7.4 The Customer Service Team Manager is collaborating with the Transformation Team to review and update the Customer Experience Strategy. Additionally, they are working with the Communications Team Manager on a project aimed at improving customer contact. This project focuses on:
- Reducing avoidable contact
 - Renewing website content
 - Enhancing the written word and tone of voice in letters sent to customers across the authority
 - Implementing mandatory customer service training for all officers

7.0 Conclusion

- 7.1 The Customer Services team has made significant strides in enhancing the quality and efficiency of service delivery over the past year, despite facing challenges such as increased abusive behaviour and mental health issues among customers. The Team has implemented effective strategies to address these issues, including enhanced no tolerance messaging and root cause analysis.
- 7.2 The retention of customer service accreditation, with full compliance in all elements and excellence in several "compliance plus" areas, underscores the team's commitment to high standards. The introduction of the 'secret shopper' survey has provided valuable external feedback, contributing to an impressive average score of 90%.
- 7.3 Overall, the Customer Services team has demonstrated resilience and dedication in improving customer satisfaction and responsiveness, aligning with the Council's goals and principles outlined in the Customer Experience Strategy. Continued focus on staff wellbeing and customer insight will ensure sustained progress in delivering exceptional service to residents.

Policies and other considerations, as appropriate	
Council Priorities:	A well-run council
Policy Considerations:	None
Safeguarding:	None directly, but safeguarding is a consideration in some customer interactions
Equalities/Diversity:	None
Customer Impact:	Detailed in the report.
Economic and Social Impact:	None.
Environment, Climate Change and zero carbon:	None.
Consultation/Community Engagement:	None.
Risks:	None
Officer Contact	Nichola Oliver Customer Services Team Manager nichola.oliver@nwleicestershire.gov.uk

NORTH WEST LEICESTERSHIRE DISTRICT COUNCIL

CORPORATE SCRUTINY COMMITTEE – TUESDAY 19 JUNE 2025



Title of Report	CORPORATE COMPLAINTS AND FEEDBACK ANNUAL REPORT	
Presented by	Nichola Oliver Customer Services Team Manager	
Background Papers	None.	Public Report: Yes
Financial Implications	There are no financial implications in respect of this report.	
	Signed off by the Section 151 Officer: Yes	
Legal Implications	There are no legal implications arising from this report.	
	Signed off by the Monitoring Officer: Yes	
Staffing and Corporate Implications	There are no direct staffing or corporate implications arising from this report.	
	Signed off by the Head of Paid Service: Yes	
Purpose of Report	<p>This is the Council's annual complaints' report for the period 1 April 2024 to 31 March 2025. It includes information in respect of complaints across all directorates. It also provides information for decisions issued by the Local Government and Social Care Ombudsman (LGSCO) and the Housing Ombudsman (HO) in the same period.</p> <p>The report contributes to the Council's aspirations in the Corporate Delivery Plan of being customer focused by acknowledging that complaints and formal enquiries provide a regular and rich source of feedback from residents that inform the Council when things have gone wrong. Learning from this provides the opportunity to improve services to support residents.</p> <p>This is an opportunity for this committee to provide any feedback and comments before it is considered by Cabinet on the 24 June.</p>	
Recommendations	THAT THE COMMITTEE CONSIDERS THE REPORT AND POLICIES AND PROVIDES ANY COMMENTS FOR CABINET TO CONSIDER AT ITS MEETING ON 24 JUNE 2025.	

1.0 BACKGROUND

- 1.1 Each year, the Council is required to prepare an annual summary of complaints dealt with under the corporate Complaints Policy (the year runs from 1 April 2024 to 31 March 2025). A complaint is defined within the Council as: *'an expression of dissatisfaction,*

however made, about the standard of service, actions, or lack of action by the organisation, its own staff, or those acting on its behalf affecting an individual/resident or a group of individuals/residents'.

- 1.2 The Council provides a wide range of services to its residents and receives relatively few complaints, the Council seeks to learn from them and look for patterns of service failure. The Council continues to use the feedback it receives from its complaints to generate ideas for service improvements both in the short and long term.
- 1.3 The Council works hard to view the complaints it receives as a positive opportunity, whilst remaining focused on trying to resolve them to the satisfaction of residents as quickly as it can.
- 1.4 This is a report on all Council services' formal enquiries which are:
 - Complaints
 - Member Enquiries
 - MP Enquiries
- 1.5 Many service requests and enquiries are resolved informally by officers and managers every day without the need for the formal complaints' process to be followed. Officers are urged to address customer grievances and proactively rectify issues as part of their normal business. These are not all formally logged or reported on, though services are encouraged to record these informal enquiries in some way to inform the way they deliver and improve their services in the future. Managing complaints informally as soon as possible represents best practice.
- 1.6 Where a request for service has been sent via the complaints process but is not deemed as a corporate complaint these are logged as a 'Request for service' and are recorded and reported on a quarterly basis.
- 1.7 The Council's complaints procedure is designed to address those issues that necessitate a formal reply and, as such, could not be resolved during the earlier stages of the process. The Complaints Policy and procedure can be found in Appendix 1 of this report.
- 1.8 As of the 1 January 2023, all stage 1 complaints are signed off by a Strategic Director. Stage 2 complaints are signed off by the Chief Executive to ensure that everything that could have been done to resolve the matter has been investigated prior to the complainant seeking independent review by the relevant ombudsman.
- 1.9 This report focuses not only on volumes and timeliness of responses but also aims, when it is possible, to identify themes and lessons learnt that result in service improvements.
- 1.10 The Council has a commitment to learning and improvement. Complaints and other formal enquiries are important information, providing an opportunity to understand where and why things sometimes go wrong and provide a basis for the Council to make positive changes, informed by data and the resident voice.

2.0 Complaints overview

2.1 Number of Complaints and Enquiries - all stages

Level	2023/24	2024/2025
Stage 1	263	346
Stage 2	74	107
Housing Ombudsman and Local Government and Social Care Ombudsman (that have reached formal investigation stage)	11	23

MP enquiries	131	175
Member enquiries	634	705
Compliments	240	273

- 2.2 There was a total of 346 stage 1 complaints, which is a 32% increase on the previous year. There was also an increase of 45% compared to the previous year in respect of stage 2 complaints with a total of 107. Some of this increase could be attributed to the Government's 'make things right' campaign, more details on this campaign can be found in paragraph 2.7 of this report.
- 2.3 The Council provides a wide variety of services for over 97,200 residents. In this context, 453 complaints (stage 1 and 2 combined) are only a fraction of the number of customer interactions occurring each year. For example, the Council's Customer Service team received 97,264 customer interactions alone in 2024/25.
- 2.4 The number of compliments recorded by the Council also increased, from 240 in 2023/24 to 273 (an increase of 14%). Improved efforts by Council departments to capture more of the positive feedback of residents is reflected in this increase. There is better engagement of staff in the process of recording the compliments they receive.
- 2.5 The number of stage 1 complaints received can be broken down by service as follows:

Service	Number of Complaints	As a % overall
Waste Services	53	15
Environmental Protection	10	3
Leisure Services	6	2
Community Safety	6	2
Customer Services	4	1
Finance	1	0.3
Housing Assets	22	6
Housing Repairs	156	45
Housing Management	41	12
Housing Strategy and Systems	15	4
Property Services	1	0.3
Environmental Health	2	1
Planning and Infrastructure	10	3
Revenues and Benefits	19	5

- 2.6 The number of complaints for each service does not necessarily provide a direct correlation with the standard of customer service provided, and these overall results cannot be treated in isolation. Each of these service results are heavily influenced by the type of business transacted by that service, for example, the number of customer facing transactions carried out, the public profile of the actions carried out by that service, and whether the customer has alternative formal routes for redress or appeal.
- 2.7 Housing Repairs received the highest number of complaints, with a significant 59% increase in 2024/25 (156) compared to 2023/24 (98). This rise could be attributed to the Government's 'Make Things Right' campaign in 2024, which aimed to raise awareness among social housing residents about their rights to report issues and make complaints regarding their living conditions [Make Things Right | Social housing issue? Know how to complain.](#)
- 2.8 Considering the volume of interaction⁹³ Housing Repairs has with residents, for example, 55,157 contacts in 2024/25, the number of complaints received is relatively

low. The complaints represent approximately 0.28% of the total transactions completed.

- 2.9 Waste Services received the second-highest number of complaints. However, these complaints are minimal when considering the number of interactions with residents. In 2024/25, Waste Services provided waste and recycling collections to around 48,640 properties within the district each week, totaling approximately 3,720,960 collections a year. The number of complaints received as a proportion of total collections is just 0.001%.

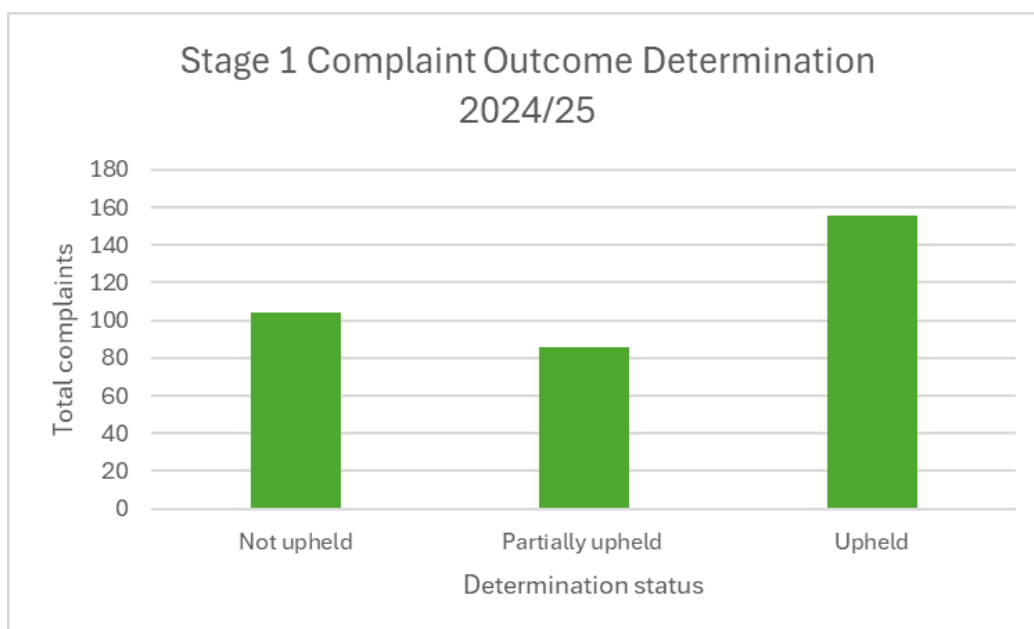
3.0 Complaint Outcomes

- 3.1 Complaint outcomes are determined with one of the following statuses:

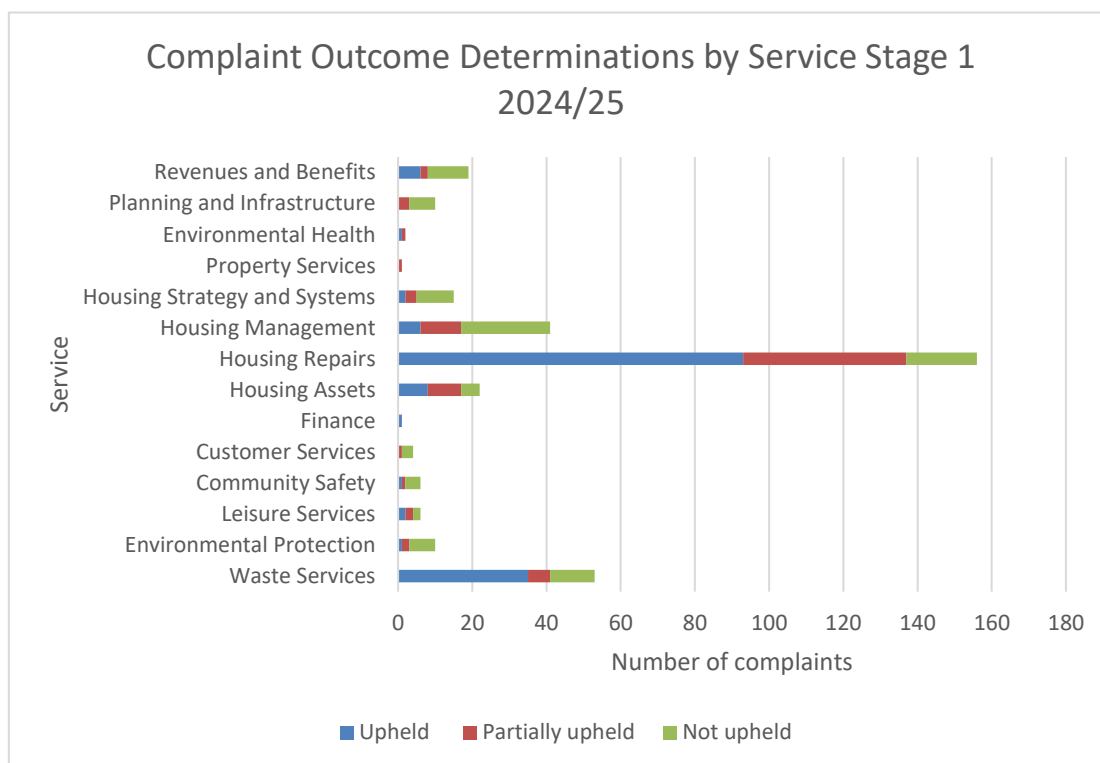
- Upheld- following investigation the Council has found in favour of the complainant.
- Not upheld - following investigation the Council has not found in favour of the complainant.

- 3.2 Sometimes complaints have more than one issue to be investigated. On occasion, these can have a mixture of the two above determinations and have a status partially upheld.

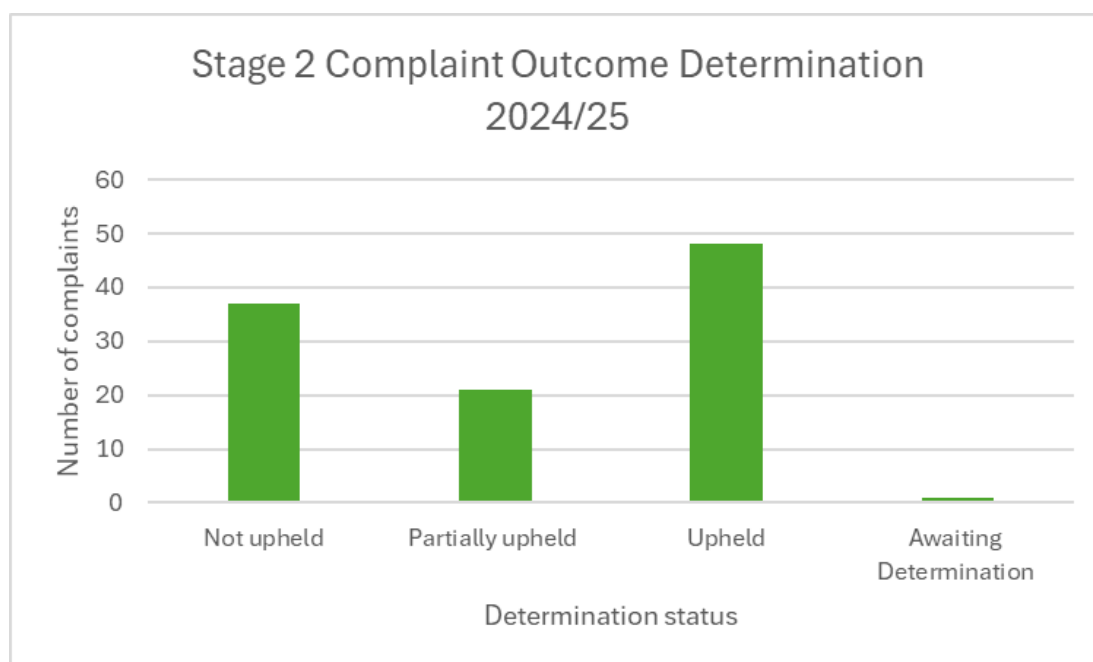
- 3.3 Stage 1 complaint outcome determination across the Council can be seen in the graph below. A total of 45% (156) of complaints were fully upheld when investigated at stage 1 of the complaints process.



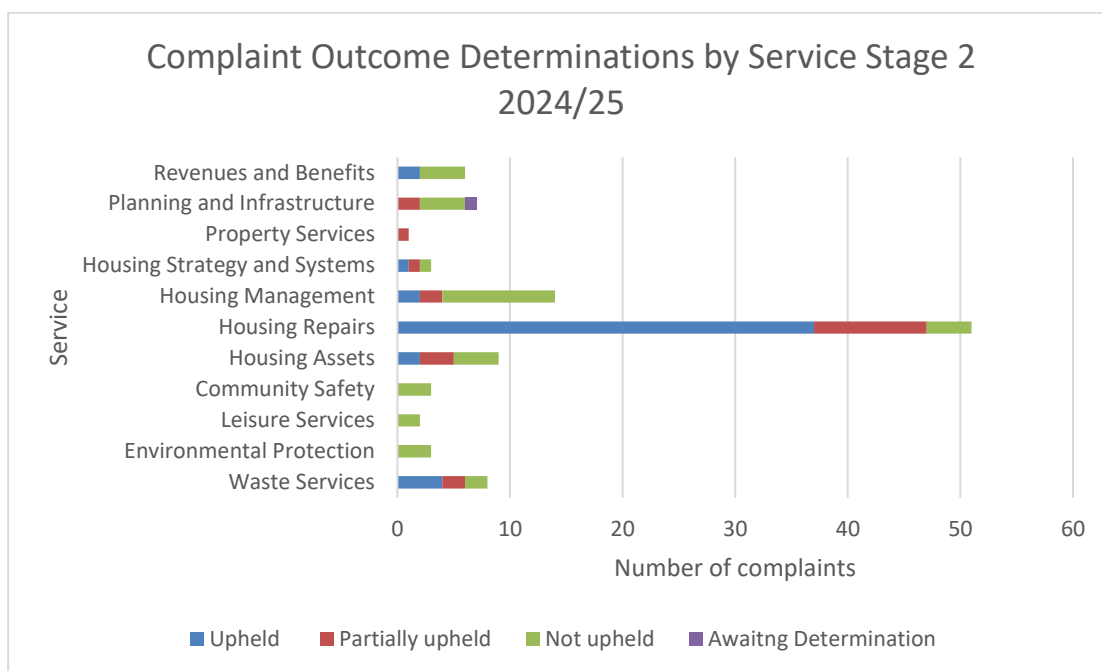
- 3.4 The graph below illustrates the stage 1 determinations by service. Housing Repairs has the highest upheld rate, with 93 complaints upheld and 44 partially upheld out of complaints for the service.



Stage 2 complaint outcome determination across the Council can be shown in the graph below. A total of 45% (48) of complaints were fully upheld when investigated at stage 2 of the complaints' process.



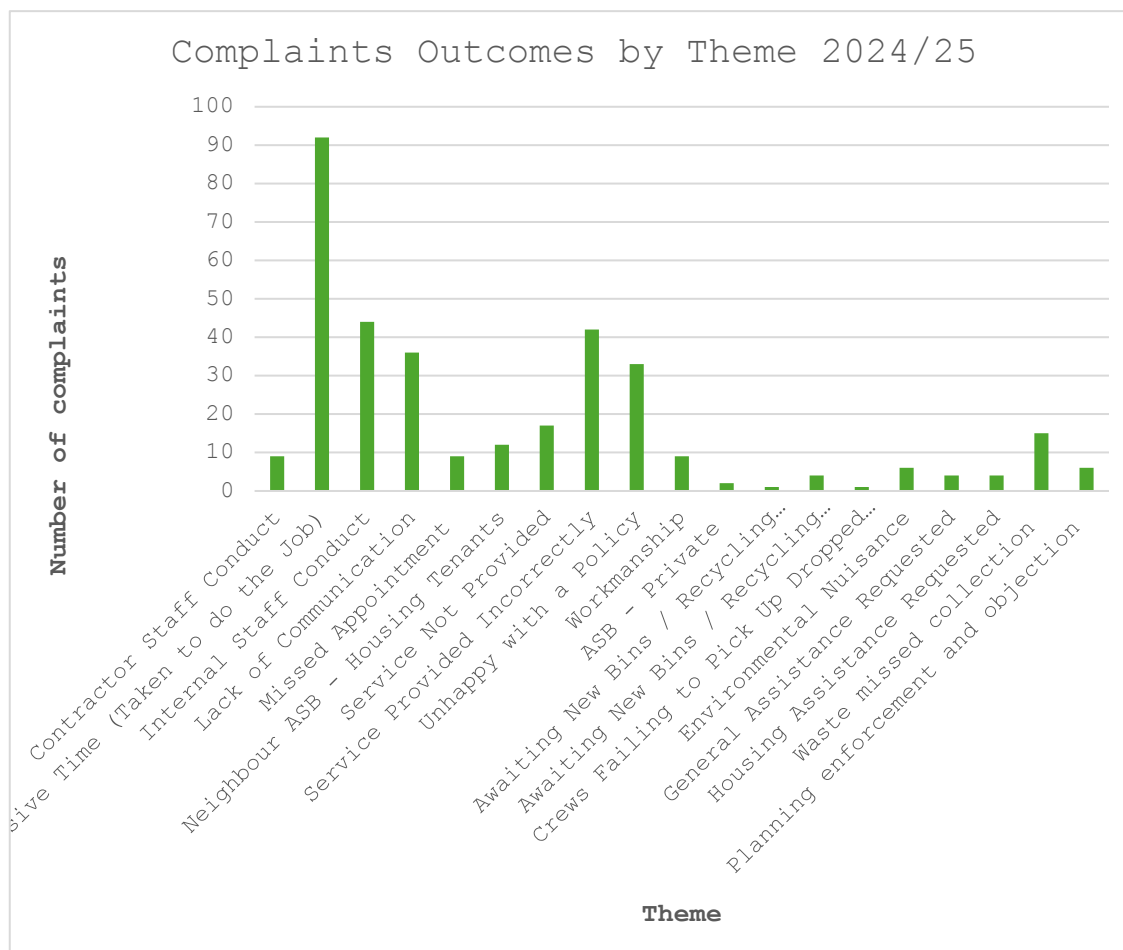
- 3.5 The graph below illustrates the stage 2 determinations by service. Housing repairs has the highest upheld rate, with 37 complaints upheld and 10 partially upheld out of complaints for the service. Given the volume of complaints within the housing service, quarterly reports are now prepared for the Strategic Director of Communities. These reports provide an overview of the complaints, including themes and outcomes. The findings are subsequently shared with the Tenant Scrutiny Panel.



4.0 Complaint Themes

4.1 As part of the process of monitoring and handling customer feedback, the Complaints Team is responsible for categorising complaints based on the subject matter. The following diagram outlines the categories of complaints received in 2024/25.

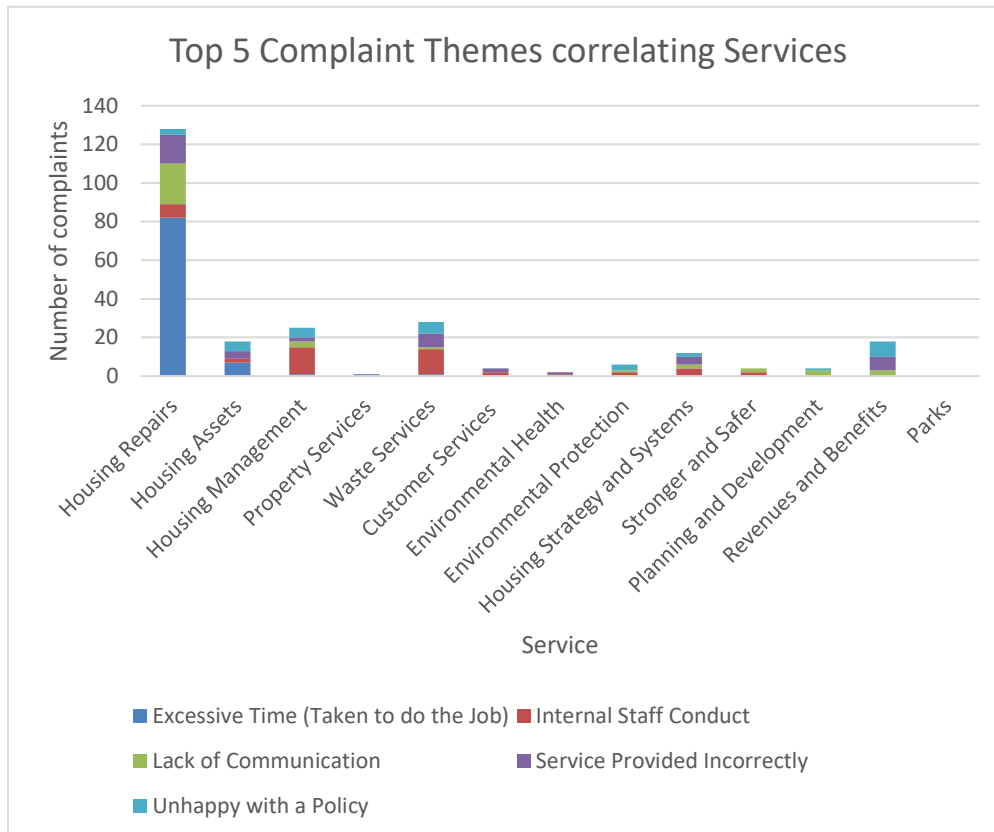
4.2 Stage 1 – Themes of Complaint – 2024-25 Whole Council



4.3 92 (27% of all) complaints were categorised as excessive time taken to carry out a

service. Complaints within this category have increased from 76 in 2023/24 (an increase of 21%).

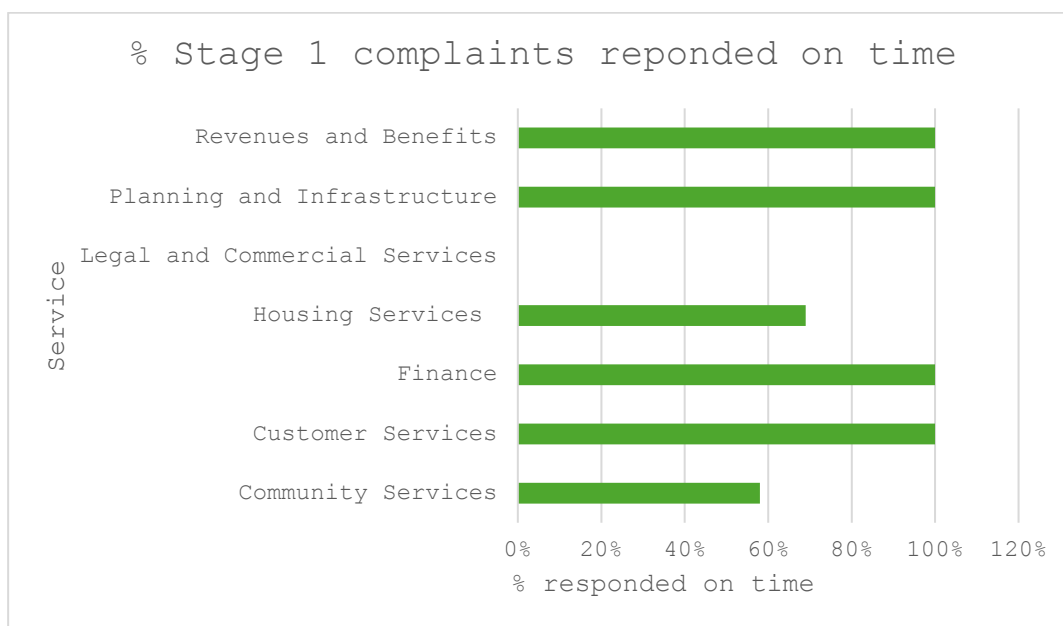
- 4.4 Staff conduct accounted for the second highest category of complaints, with 44 (13%) complaints. Complaints within this category have increased from 33 in 2023/24. These are where the complainants consider that an employee has behaved poorly either in person or on the phone. These are front-facing roles such as repair operatives, housing officers, community safety officers, customer services officers. These are usually related to a disagreement over a decision or action taken. Of the 44 complaints over staff conduct, 11 (25%) were upheld in the customer's favour, two (5%) partially upheld and the remaining 31 (70%), the Council was not found to be at fault.



- 4.5 The categories of excessive time taken, staff conduct, and lack of communication were common reasons for complaints across all services. However, the Housing Repairs Service was the primary source of complaints about excessive time taken, with 82 out of 92 complaints in this category and 21 out of 36 regarding lack of communication. This issue directly correlates with the housing improvement plan, which has significantly reduced the number of outstanding repairs from 7,000 to 1,800—a 75% reduction. The Housing Service's commitment to further reduce this backlog to a normal level within the next 12 to 18 months is expected to lead to a decrease in complaints about excessive time taken.

5.0 Complaints Performance

- 5.1 The Council's service standard is to respond in full to a complaint within 10 working days of receipt. If this is not possible within that timeframe (for example, because of the complexity of the complaint, the number of parties involved or awaiting additional information), a holding response is sent to the customer. This standard was met in 70% of complaints at stage 1 (242 complaints), processed in the year 2024/25.
- 5.2 When a complaint is escalated to stage 2, the investigating Head of Service has 10 working days to respond. This standard was met in 70% of escalated complaints (75 complaints).



- 5.3 All services endeavour to focus on providing a high-quality response that resolves all the issues raised and finds a suitable outcome in a timely way, whilst keeping the complainant informed and up to date with progress. Responding to complaints within the timeframe is a key performance indicator within the Council Delivery Plan and something that is being highlighted as an area for improvement in 2025/26 particularly for Housing and Community Services who failed to hit the targets set for 2024/25.

6.0 Financial remedies

In awarding compensation, the Council must consider:

- The housing compensation policy which sets out the grounds and basis upon which compensation may be awarded and is applicable to all tenants of the Council [Compensation Policy](#)
- Corporate compensation payments are in accordance with the Councils Financial Procedure Rules provided that the Monitoring Officer, in consultation with the relevant Strategic Director has advised on the appropriateness of compensation as per the constitution.
- Whether any statutory payments are due
- If any quantifiable losses have been incurred
- The time and trouble a customer has experienced
- Any distress and inconvenience caused
- The remedies guidance issued by the relevant Ombudsman

- 6.1 Suggested ranges of compensation are set out by the Ombudsman and the Housing Ombudsman also gives additional guidance in determining the adverse effect and impact on customers in particular circumstances.

- 6.2 Neither this guidance nor the suggested ranges are intended to be prescriptive, and discretion is required on a case-by-case basis to decide what is fair and reasonable in the circumstances of each situation.

- 6.3 For the annual year 2024/25, the Council have paid in total £27,372.26 as a financial remedy to complaints including compensation ordered by the Ombudsman compared to £20,888.61 for the year 2023/24.

7.0 Unreasonable behaviour and communication

- 7.1 Occasionally, the behavior or actions of individuals using the Council's services makes it very difficult for the Council to deal with their complaint. In a small number of cases, the actions of individuals become unacceptable because they involve abuse of the Council officers or the Council processes. When this happens, the Council must take action to protect the health and wellbeing of officers who have a right to do their jobs without fear of being abused or harassed. The Council must also consider the impact of the behaviour on the Council's ability to do work and provided a service to others.
- 7.2 As a result, the Council has developed an Unreasonable Behaviour and Communication Policy to set out how it deals with unreasonable behaviour and communication. This policy can be found in Appendix 4 of this report.
- 7.3 The Policy has been drafted with regards to the Local Government Ombudsman's (LGO) Guidance note on 'unreasonably persistent complainants' and 'unreasonable complainant behaviour' and the Housing Ombudsman complaints code of conduct.

8.0 External Bodies

- **Local Government and Social Care Ombudsman (LGSCO)**
- **Housing Ombudsman (HO)**

- 8.1 If complainants are not satisfied with the outcome of their complaint as investigated through the Council's complaints procedures, they can escalate their complaint to the Ombudsman. This section of the report provides information on cases that the Ombudsman has made decisions on in the 2024/25 period.
- 8.2 The Housing Ombudsman (HO) manages enquiries and complaints that are related to services provided by the Council as a social landlord e.g., repairs to properties.
- 8.3 The Local Government and Social Care Ombudsman (LGSCO) handles enquiries and complaints that are related to all other Council services. This includes non- landlord housing issues such as housing allocation, homelessness and temporary accommodation which is categorised in LGSCO reports as "Housing".
- 8.4 The HO and LGSCO produce annual review reports and the data, feedback and recommendations and remedies made in these are reviewed by the feedback team who ensure the relevant service areas act on them in a timely manner.

Local Government and Social Care Ombudsman

- 8.5 In February 2024, the LGSCO introduced a complaint code as "advice and guidance" for all local councils in England under section 23(12A) of the Local Government Act 1974. This means that councils should consider the Code when developing complaint handling policies and procedures and when responding to a complaint. The complaint code can be found at: [LGSCO Complaint code](#)
- 8.6 The LGSCO produces an annual report on the complaints they have received and the outcomes of each case this can be found at: [LGSCO annual report](#).
- 8.7 In 2024/25, eleven complaints were escalated to the Local Government and Social Care Ombudsman (LGSCO). Of these, five were not for them as an Ombudsman and therefore redirected to the Housing Ombudsman, the LGSCO decided not to investigate five complaints. The remaining complaint was investigated, and the Council was not found at fault.

Housing Ombudsman

- 8.8 The Housing Ombudsman Service is set up by law to look at complaints about the

housing organisations that are registered with them. It resolves disputes involving the tenants and leaseholders of social landlords (housing associations and local authorities) and voluntary members (private landlords and letting agents who are committed to good service for their tenants).

- 8.9 On the 1 April 2024, the HO published its revised Complaint Handling Code which was first introduced in June 2020. This sets out requirements for member landlords that will allow them to respond to complaints effectively and fairly.
- 8.10 The Code ensures complaint handling data is being used consistently across landlord members, promotes engagement at different levels within a landlord and sets out expectations for boards or equivalent governance, senior executives and frontline staff.
- 8.11 Compliance with the Code forms part of the membership obligations. Members are obliged to complete a self-assessment to measure the level of compliance. The Council's latest self-assessment based upon the latest code can be found in appendix 2 of this report.
- 8.12 When carrying out a complaint investigation the Ombudsman will consider whether the landlord addressed the complaint in accordance with the Code. Any failure identified could result in a finding of:
- Severe maladministration
 - Maladministration
 - Service failure
 - Mediation
 - Redress
- 8.13 Following an investigation where some level of maladministration has been found the HO could put an order and or recommendations in place to correct matters. The HO can also make recommendations on any case that has been investigated and determined by them to help improve service delivery and promote learnings from outcomes and ensure compliance with the Code.
- 8.14 The HO's Complaint Handling Code can be found at: [Housing Ombudsman complaint code](#)
- 8.15 The Housing Ombudsman has not yet published its Landlord Reports for 2024/2025 so all data presented below is from the Council's systems. The Landlord Performance report is normally received in October. Appendix 3 of this report shows the Housing Ombudsman's Landlord performance report for 2023/24.
- 8.16 In 2024/2025 the Council had 13 complaints escalated to the Housing Ombudsman Service (HOS), the HOS formally investigated all 13 cases. The determinations found by the HOS on the 13 cases were two cases of no fault by the Council and 11 cases of the Council found at fault. The determinations of the Council being found at fault as follows:
- 3 x maladministration in handling repairs
 - 2 x maladministration in handling of ASB reports
 - 1 x service failure for handling of repairs
 - 2 x service failure for handling of complaint
 - 1 x service failure for handling of report of flooding
 - 1 x severe maladministration in handling of multiple repairs
 - 1 x maladministration in handling of reports of disrepair
 - 4 x maladministration in handling of complaint

- 1 x service failure for handling staff conduct
- 1 x service failure for handling of communication
- 1 x maladministration in handling repairs and response to damp and mould.

8.17 As a result of the HO determinations a number of recommendations and orders were put in place by the HO some of which were:

- The landlord should consider re-training of housing staff on complaint handling.
- The landlord should provide training on effective communication.
- The landlord should improve record keeping.

9.0 Learning points

9.1 The Council treats every complaint as an opportunity to identify learning outcomes and improve service provision. Complaints are valuable not only in identifying service improvements, but in improving public perception and satisfaction with the Council as a whole. Each complaint can be an opportunity to make changes or service improvements on a small or greater scale.

9.2 Examples of some of the learning points and improvements made as a result of complaints during 2024/25 include:

- Ensuring continuity in communication for ongoing complaints and keeping the complainant informed on updates.
- Speaking directly to customers to outline any potential delays in dealing with their request, whatever the reason might be.
- Communicating updates have been implemented with monthly internal articles, which have included statistical updates, lessons learnt and guidance on conducting investigations and formulating responses.
- The Customer Experience Team Leader continuing to support the repairs service with their complaints in particular the ombudsman responses.
- The Customer Services Team Manager setting up a group to review the customer contact standards as an organisation which will help improve culture and complaints.
- Undertaking Root Cause Analysis sessions with Waste and Housing Management services teams including looking at avoidable contact and how we better the customer journey.
- The Customer Services Team Manager developing additional training to assist with complaint investigations. This training, which is mandatory, has been rolled out to all NWL leaders and additional officers who handle complaints.

9.3 Looking back to the last year's HO cases, there are a number of themes that have come forward when the Council considers these cases. Whilst each is unique there are some common threads which we are addressing -

The timeliness of repairs – a broad theme around repairs times which largely stems from the issues of service interruption around COVID. This is being tracked through the Cross-Party Housing Improvement Board which has seen a 75% reduction in the number of outstanding repairs from 7,000 to 1,800.

Training – there are a number of instances where the HO has asked the Council to refresh training on specific issues in the service. This has included ASB, bereavement, safeguarding, and the new regulatory standards. These have been added to a renewed focus on skills and training of staff which now occur quarterly.

Responsiveness to reports of leaks and damp – greater emphasis on damp and

mould responsiveness should be seen with the introduction of Awaab's Law being introduced from October 2025.

Record keeping – a number of changes to systems have taken place to help improve records of interactions with tenants. These range from Tenancy Audits, through to Stock Condition and the increased use of hand-held devices to enable greater on-the-spot reporting and record updating. This will continue to be a focus of the Improvement Plan going forwards.

9.4 Improvements for the forthcoming year of 2025/26 are:

- Focusing on the timeliness in responding to complaints to accord with the Council's Delivery Plan targets of 100% within timeline.
- Continuing to focus training on the importance of complaints across the Council.
- Working with the Housing Improvement Board to provide a greater understanding of the service.
- Reviewing the Customer Contact Standards to make them corporate and achievable
- Improving the culture to be more customer centric.

10.0 Member and MP enquiries

- 10.1 Member and MP Enquiry data is included in the annual formal enquiries report as it is acknowledged that there is great similarity between the types of complaints submitted and the types of Member/MP enquiries received. It is not uncommon for a resident to make a complaint and then contact their Councillor about the same issue.
- 10.2 For the period 1 April 2024 to 31 March 2025, the total number of Member Enquiries received was 705, compared with 634 in the previous period. This is an 11% increase in the number of Member Enquiries compared with the previous year's figures.
- 10.3 For the period 1 April 2024 to 31 March 2025, the total number of MP Enquiries received was 175, compared with 131 in the previous period. This is a 34% increase in the number of MP Enquiries compared with the previous year's figures.

Member and MP enquiries by service.

Service	Number of Member enquires	Number of MP enquires
Community Services	330	26
Customer Services	6	4
Economic Regeneration	4	2
Finance	1	0
Housing services	218	96
Human Resources	3	1
Legal and Commercial Services	10	0
Planning and Infrastructure	95	30
Revenues and Benefits	9	9
Not NWLDC function	28	5
Totals	705	175

11.0 Corporate Objectives and Priorities

- 11.1 The reporting of complaints is embedded in the Council's performance management process, giving further opportunity for issues to be raised throughout the year, and for wider corporate trends to be identified should they arise.
- 11.2 A robust and effective complaints process ensures the Council is able to meet its vision, working collaboratively to deliver high quality services that support all communities in the District.
- 11.3 Reviewing and learning from complaints ensures the Council is committed to delivering its values. Delivering high standards in everything the Council does which shapes behaviours and builds trust with its residents.

12.0 Conclusion

- 12.1 Complaints at service level remain low, particularly when compared to the overall volume of interactions the Council has had with the public in the same period, this does not negate the fact that the Council takes each complaint seriously when investigating and act upon any learning that has been identified. The Council is not complacent about the matters raised.
- 12.2 More work is required with services on the culture around complaints to ensure consistency on timeliness of responses and the importance of complaints.
- 12.3 The consistency of complaints reporting suggests that the complaints process continues to work effectively, and that the public can make a complaint with ease. Where necessary, trends are identified by the feedback team and managed by individual services. The Customer Services Team Manager and Customer Experience Team Leader will continue to work closely with Services to identify ways to effectively manage and resolve complaints.

Policies and other considerations, as appropriate	
Council Priorities:	A well-run council
Policy Considerations:	Corporate Complaints Policy Unreasonable Behaviour and Communication Policy
Safeguarding:	None.
Equalities/Diversity:	None
Customer Impact:	The report provides an overview into how residents experience Council services. Over the reporting period, the feedback has highlighted both areas of strength and opportunities for improvement. Where complaints have been upheld, the Council has taken steps to address root causes, whether that's through staff training, process reviews or improved communication.
Economic and Social Impact:	None.
Environment, Climate Change and zero carbon:	None.
Consultation/Community Engagement:	None.
Risks:	<p>A recurring pattern of complaints in specific areas may indicate deeper systemic issues. If left unaddressed, these could erode public confidence and lead to reputational damage.</p> <p>Delays in responding to or resolving complaints brings a risk to the Council's commitment to customer care. Timeliness is a critical factor in maintaining trust with our residents.</p> <p>Failure to act on complaint trends or to implement learning from upheld cases could leave the Council exposed to legal or regulatory scrutiny, particularly where vulnerable individuals are affected.</p> <p>If staff training, communication or policy clarity is not addressed, it may lead to service failures. These risks can compound over time, leading to increased volumes of complaints and greater strain on resources.</p>
Officer Contact	Nichola Oliver Customer Services Team Manager nichola.oliver@nwleicestershire.gov.uk



Item	Details
Reference:	Corporate Complaints and Feedback Policy
Status:	Final
Originator:	Kerry Spiers
Owner:	Nichola Oliver
Version No:	1
Date:	1 April 2025

Corporate Complaints and Feedback Policy

Key policy details

Approvals

Item	Date of Approval	Version No.
Consulted with Legal Services	30.12.2022	1
Reviewed by Corporate Scrutiny Committee	TBA	
Approved by Cabinet	TBA	

Policy Location

This policy once approved will be found on the following page of the website [Complaints, compliments, comments - North West Leicestershire District Council](#)

Equality Impact Assessment (EIA)

Completed by	Completion date
Nichola Oliver	September 2023

Revision history

Version Control	Revision Date	Summary of Changes

Policy Review Plans

This policy is subject to a scheduled review once every two years or earlier if there is a change in legislation or local policy that requires it.

Distribution

Title	Date of Issue	Version No.
Website	TBA	

We welcome your feedback

Northwest Leicestershire District Council has a positive complaint handling culture which is integral to the effectiveness with which we resolve disputes. We use complaints as a source of intelligence to identify issues and introduce positive changes in service delivery.

We are committed to providing high quality services and we welcome your feedback on how we are performing.

Our staff take great pride in their work, and we love hearing from customers who have received excellent service.

We always try to get things right first time, but we recognise that sometimes things can go wrong and if they do, we want to know, so we can put them right and learn from any mistakes.

This policy explains how you can make a compliment, comment or complaint and how we will investigate it and respond back to you.

This policy and the relevant Ombudsman complaint handling codes can be found on our website: <https://www.nwleics.gov.uk/>. If you require this policy in a different format, please contact Customer Services on 01530 454545.

Complaints

What is a complaint?

We consider a complaint to be *'an expression of dissatisfaction, however made, about the standard of service, actions, or lack of action by the organisation, its own staff, or those acting on its behalf affecting an individual/resident or a group of individuals/residents'*. We will always encourage you to resolve your problems directly with the relevant service area before making a complaint, as this is most often the quickest way of resolving problems when they occur.

Please use our complaints process if you think the Council has not:

- Provided the standard or quality of service promised.
- Followed our own policies.
- Responded promptly to your enquiry or request for service.
- Treated you fairly.
- Treated you with courtesy.

If you make a complaint to the Council, we will investigate and respond using the procedure set out in this document. We promise to deal with your complaint promptly, courteously and fairly.

When dealing with complaints, the Council works in line with the Local Government Ombudsmen's six principles of good administration:

1. Getting it right....
2. Being service user focused...
3. Being open and accountable...
4. Acting fairly and proportionately...
5. Putting things right ...
6. Seeking continuous improvement...

If you would prefer us not to investigate and respond, you can still make a comment on our services, which we will feed back to the relevant manager. Feedback via our social media channels will need to be submitted through the established routes below.

The Council also recognises that sometimes serious dissatisfaction with our services may be expressed informally. In these cases, due the nature of the service failure, the Council itself may choose to invoke the complaints procedure, to ensure that the issue is properly investigated, resolved and that lessons learned are captured.

Not a complaint?

Sometimes the complaint process is not the most appropriate route to address your concern. If this is the case, we will contact to you to explain why, and which other processes are open to you. Examples of issues that we cannot address through our complaints process include, but are not limited to:

- When you first report a fault or problem (e.g. reporting a bin has not been collected or a leaking roof in a Council-owned property). This will be dealt with and recorded as a Request for Service. A complaint will be raised when an individual expresses dissatisfaction with the response to their service request, even if the handling of the service request remains ongoing. The council will not stop its efforts to address the service request if the individual complains.
- An expression of dissatisfaction with services made through a survey is not defined as a complaint, though wherever possible, those completing the survey will be made aware of how they can pursue a complaint if they wish to. Where we ask for wider feedback about our services, we will also provide details of how individuals can complain.
- A matter which occurred over twelve months ago unless there are exceptional circumstances to why you are making the complaint outside this timeframe.
- When you have concerns about an issue in the District, such as a noise or public nuisance – these should be directed to our Environmental Protection team who will investigate and may need to take enforcement action.
- If you are making objections regarding a Planning application, these should be via our [planning portal](#). Objections to a planning application will not be considered as part of the complaints policy.
- The correct application of the law or a Council Policy, or to matters for which there is another right of appeal. Sometimes you may have a statutory right of appeal against a decision that has been made for example Issues for which

statutory appeal bodies or tribunals have been established, for example, The Appeals Service (for Benefit appeals), The Planning Inspectorate (for Planning appeals).

- Complaints which amount to a disagreement with the Council about its decision rather than the way the decision has been administered (e.g. the Council Tax banding or the allocating of council properties in accordance with its allocation policy).
- Complaints regarding a decision made by the Council when exercising its regulatory powers (e.g. licensing, serving notices) or undertaking its statutory duties (e.g. making a decision on a homelessness claim) unless the complaint relates to the way the matter has been administered.
- Matters in which legal proceedings have started (legal proceedings are considered to be started when details of the claim, such as the Claim Form and Particulars of Claim, have been filed at court).
- Complaints which amount to a disagreement with or refusal to accept a rule of law which the Council is applying.
- Complaints which constitute an allegation of fraud and/or corruption will need to be dealt with under the [Whistle Blowers Policy](#).
- Complaints about Elected Member's conduct. These are handled by the Monitoring Officer through a separate process [Local Code of Conduct - North West Leicestershire District Council \(nwleics.gov.uk\)](#).
- Complaints which amount to a petition. Whilst the Council welcomes petitions, these are handled by the Council's Democratic Services team under the Councils' Petition Scheme [Petitions - North West Leicestershire District Council \(nwleics.gov.uk\)](#)
- Complaints about the conduct of an election, which is the responsibility of the Returning Officer.
- Insurance Compensation claims. These are handled by the Council's Finance Team and the Council's Insurers.
- Grievances by existing, or former, employees about their employment. These need to be referred to the Head of HR and Organisational Development.
- A request for information or an explanation of Council policy or practice.
- Freedom of Information (FOI), Environmental Information Regulation (EIR) and Data Protection requests [How to make a Freedom of Information request - North West Leicestershire District Council \(nwleics.gov.uk\)](#)

- Matters that have previously been considered under the complaints and Ombudsman's process.
- Matters relating to a Business-as-Usual Request that has been previously notified to the Council and is awaiting action within an agreed timescale (e.g., a non-urgent housing repair that may be actioned up to 60 days after notification).
- If the Complaint is about something that a different council or other organisation is responsible for, the Council will signpost you to the right organisation.

However, the circumstances of each complaint will be considered and we may exercise discretion to accept complaints even if one of the exclusions applies.

If you would like more information on any of the issues listed above, please contact Customer Services on 01530 454545 who will be happy to advise you.

How can I make a comment or complaint?

Individuals may make a complaint in the way most suitable for them. This includes in writing, by email, over the telephone or face to face on appointment. Any member of staff will be able to take a complaint and pass it to the Feedback team.

The complaints process is open to everyone who receives, should receive, or requests a service from the Council. You can contact us via the following channels:

- Click [here](#) to complete our online Compliment, comment or complaint form
- Calling our Customer Services team on 01530 454545
- Through a representative for example your Councillor, MP, Housing Officer, or Support Worker
- Visiting in person at:

Customer Centre
Belvoir Road
Coalville
LE67 3PD

or writing to us:

Feedback Team
NWLDC
PO Box 11051
Coalville
LE67 0FW

What will happen when I make a complaint?

We investigate all complaints thoroughly and with an open mind. If you want a friend or relative to take your complaint forward on your behalf, please let us know and we will be happy to work through your representative. You might also want to seek help from your local ward councillor – a key part of a councillor's role is to act as a community champion and he or she would be happy to help you. Contact details for your councillor can be found on the Council website, or by calling the Customer Services team on 01530 454545.

When we receive a stage 1 complaint, or a request to escalate a complaint to stage 2, we will acknowledge the complaint within 5 working days, setting out our understanding of the complaint and the outcomes the complainant is seeking. We call this the "complaint definition". If any aspect of the complaint is unclear, we will ask for clarification.

We will then investigate your complaint and aim to provide a response within ten working days from the date of acknowledgement.

Sometimes this process may take longer, for example if we need further information or the complaint is very complex, but we will update you on the progress of your investigation every ten working days until a full response can be given.

If we are at fault, then we will apologise and try to put things right. If we do not think we are at fault, then we will explain why.

If there are some aspects of the complaint that are not the responsibility of the council, we will make that clear in the acknowledgement

We will:

- Deal with complaints on their merits, act independently and have an open mind
- Give the complainant a fair chance to set out their position
- Take measures to address any actual or perceived conflict of interest
- Consider all relevant information and evidence carefully

How will we respond?

The appropriate officer investigating your complaint will select the most appropriate means to respond to your complaint.

We encourage, where appropriate, investigating officers to have informal discussions with complainants before issuing the final response. This ensures that the Council has understood the issue and your expectations correctly, allowing us to explain the proposed action and closure.

All points raised in the complaint definition will be addressed and clear reasons for any decisions provided, with reference to the relevant policy, law or good practice where appropriate.

In issuing the final response, the Council may respond in a variety of means depending on the nature of the complaint and your needs. Possible channels may include verbal, face to face, email or in writing. All stage one complaints will be signed off by a Director.

Where the complainant raises additional complaints during the investigation, these will be incorporated into the stage 1 response if they are related and the stage 1 response has not been issued. Where the stage 1 response has been issued, the new issues are unrelated to the issues already being investigated or it would unreasonably delay the response, the new issues will be logged as a new complaint.

We will always write or email you to confirm that the complaint has been closed.

This is the first stage of the Council's complaint process.

What if you are unhappy with the response to your complaint?

If you are unhappy with the response to your complaint then you can ask for the complaint to be reviewed by a Senior Manager, who will reconsider your case. All Stage 2 complaint responses will be signed off by the Chief Executive.

All points raised in the complaint definition will be addressed and clear reasons for any decisions provided, with reference to the relevant policy, law or good practice where appropriate

We will acknowledge your request for a review within five working days and aim to provide a written response within twenty working days, again this process might sometimes take longer, and we will keep you informed of progress every ten working days until a full response can be given.

This is the second stage of the Council's complaint process.

Complaining to the Local Government Ombudsman or Housing Ombudsman

We aim to resolve your complaint through our internal process, but if you are still not satisfied with our response you can contact the Local Government Ombudsman; or the Housing Ombudsman in the case of tenants in Council-owned properties with complaints about housing matters. The Housing Ombudsman may be contacted at any stage throughout the complaints process to give tenants the opportunity to engage with the Ombudsman's dispute support advisors for impartial advice.

Please be aware that both Ombudsmen will normally only deal with your complaint if you have previously given the Council the chance to consider your complaint through Stages 1 and 2 listed above.

Local Government Ombudsman

Contact details for the Local Government Ombudsman are:

Local Government Ombudsman
PO Box 4771
Coventry
CV4 0EH

Telephone: 0300 061 0614

Website: www.lgo.org.uk/making-a-complaint

Housing Ombudsman

Contact details for the Housing Ombudsman are:

Housing Ombudsman Service
PO Box 1484
Unit D
Preston
PR2 0ET

Telephone: 0300 111 3000

Phonelines are open Monday to Friday 9am to 5pm

Lines will be closed for staff training every Thursday from 3.30pm to 5pm

Website: www.housing-ombudsman.org.uk

Complaints about third parties

North West Leicestershire District Council has a two-stage complaints process. Where our response is handled by a third party (for example a contractor), it will form part of the two stage process. Third parties will handle complaints in line with this policy. Please be aware that we may need to share your personal details with the third party in order to proceed with our investigations.

Remedies

Where something has gone wrong, we will acknowledge this and set out the actions we have already taken, or intend to take, to put things right and prevent the same mistake happening again:

This could include:

- apologising
- acknowledging where things have gone wrong
- providing an explanation, assistance or reasons

- taking action if there has been any delay
- reconsidering or changing a decision
- providing a financial remedy

Compensation in relation to service complaints is not offered every time the Council has made an error but is considered when the error cannot be put right.

When compensation is offered, it will always be appropriate and proportionate to the circumstances. We must think about the impact the fault has had.

Compensation payments to remedy complaints are in accordance with the Council's Financial Procedure Rules provided that the Monitoring Officer, in consultation with the relevant Strategic Director has advised on the appropriateness of compensation for instances when we do not get it right.

Where we have investigated and do not uphold all or part of a complaint, we will:

- explain the reasons for our decision clearly
- inform customers how to progress their complaint if they remain dissatisfied

A complaint may be remedied at any stage of the complaint process

Anonymous complaints

When taking details of a complaint, staff will always encourage customers to provide their identity in order for their complaint to be effectively processed. However, complaints may be made anonymously and will still be treated with the same degree of importance and within the relevant timescales set out in our procedure above. Anonymous complaints may be more difficult to investigate, and therefore in most cases will be recorded as informal complaints and investigated by the service involved in order to identify possible areas for service improvement.

What we ask of our customers

When you make a complaint, it may take some time to thoroughly investigate and respond. Our complaints procedure sets out the timescales in which you can expect to receive either an update into the progress of the investigation into your complaint or a response. We ask that the Council is given time to investigate in order to respond properly.

Customers should appreciate that not all complaints may be resolved to their satisfaction; however, we will always apologise and try to make things right if we find we are at fault. We will not tolerate abusive or unreasonable behaviour whilst investigating your complaint and ask that our staff are treated with courtesy and respect.

A very small minority of customers persist unreasonably with their complaints. This may be by:

- Continued complaints about the same issue for which they have already received a response
- Frequent complaints about a number of issues
- Frequent or abusive contact with our staff while complaints are being investigated
- Vexatious complaints targeted at individuals or teams within the Council or at Elected Members.

This can hinder our consideration of their and other people's complaints and make it difficult to resolve genuine grievances. The Council will act as appropriate against customers that we consider to be persisting unreasonably with their complaints against the Council. Actions may include but are not limited to; restriction of points of access, a consolidated and/or a limited number of replies, or in very severe cases; legal action and withdrawal of service in accordance with the Council's [Unreasonable Behaviour and Communication Policy](#).

Equal Opportunities

The Council uses the same process to investigate all complaints, and every complainant will receive the same level of service regardless of age, disability, gender reassignment, marital status, pregnancy, race, religion or belief, sex or sexual orientation.

We recognise that some groups are more vulnerable than others. Complaints involving equality issues will be handled with particular sensitivity to ensure that the matter is resolved quickly and fairly and in accordance with the Council's equality commitments.

We will make reasonable adjustments for complainants where appropriate under the Equality Act 2010. We will keep a record of any reasonable adjustments agreed, as well as a record of any disabilities a complainant has disclosed. Any agreed reasonable adjustments will be kept under active review.

Confidentiality

All complaints received will be dealt with confidentially and in accordance with the requirements of the Data Protection Act 2018.

Compliments

If we have done something particularly well, or if you think one of our staff deserves a special thank you, please let us know. You can contact us using the same methods.

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Appendix A: Self-assessment form

This self-assessment form should be completed by the complaints officer and it must be reviewed and approved by the landlord's governing body at least annually.

Once approved, landlords must publish the self-assessment as part of the annual complaints performance and service improvement report on their website. The governing body's response to the report must be published alongside this.

Landlords are required to complete the self-assessment in full and support all statements with evidence, with additional commentary as necessary.

We recognise that there may be a small number of circumstances where landlords are unable to meet the requirements, for example, if they do not have a website. In these circumstances, we expect landlords to deliver the intentions of the Code in an alternative way, for example by publishing information in a public area so that it is easily accessible.

Section 1: Definition of a complaint

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
1.2	A complaint must be defined as: <i>‘an expression of dissatisfaction, however made, about the standard of service, actions or lack of action by the landlord, its own staff, or those acting on its behalf, affecting a resident or group of residents.’</i>	Yes	Corporate complaints policy	Page 3
1.3	A resident does not have to use the word ‘complaint’ for it to be treated as such. Whenever a resident expresses dissatisfaction landlords must give them the choice to make complaint. A complaint that is submitted via a third party or representative must be handled in line with the landlord’s complaints policy.	Yes	Corporate complaints policy	Feedback officer and Customer Services are independent of any service.
1.4	Landlords must recognise the difference between a service request and a complaint. This must be set out in their complaints policy. A service request is a request from a resident to the landlord requiring action to be taken to put something right. Service requests are not complaints, but must be	Yes	Corporate complaints policy.	Page 4

	recorded, monitored and reviewed regularly.			
1.5	A complaint must be raised when the resident expresses dissatisfaction with the response to their service request, even if the handling of the service request remains ongoing. Landlords must not stop their efforts to address the service request if the resident complains.	Yes	Corporate complaints policy	<p>Page 4</p> <p>Acknowledgement letter for a 'request for service' has time frames for monitoring of response and any escalation details to corporate complaint if required.</p>
1.6	An expression of dissatisfaction with services made through a survey is not defined as a complaint, though wherever possible, the person completing the survey should be made aware of how they can pursue a complaint if they wish to. Where landlords ask for wider feedback about their services, they also must provide details of how residents can complain.	Yes	Corporate complaints policy	<p>Page 4</p> <p>Housing feedback has a QR code to complaints form.</p> <p>Customer Service satisfaction survey advises how to make a complaint if not satisfied.</p>

Section 2: Exclusions

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
2.1	Landlords must accept a complaint unless there is a valid reason not to do so. If landlords decide not to accept a complaint they must be able to evidence their reasoning. Each complaint must be considered on its own merits	Yes	Corporate complaints policy	Page 4.
2.2	<p>A complaints policy must set out the circumstances in which a matter will not be considered as a complaint or escalated, and these circumstances must be fair and reasonable to residents. Acceptable exclusions include:</p> <ul style="list-style-type: none"> • The issue giving rise to the complaint occurred over twelve months ago. • Legal proceedings have started. This is defined as details of the claim, such as the Claim Form and Particulars of Claim, having been filed at court. 	Yes	Corporate complaints policy	Page 4.

	<ul style="list-style-type: none"> • Matters that have previously been considered under the complaints policy. 			
2.3	Landlords must accept complaints referred to them within 12 months of the issue occurring or the resident becoming aware of the issue, unless they are excluded on other grounds. Landlords must consider whether to apply discretion to accept complaints made outside this time limit where there are good reasons to do so.	Yes	Corporate complaints policy	Page 4
2.4	If a landlord decides not to accept a complaint, an explanation must be provided to the resident setting out the reasons why the matter is not suitable for the complaints process and the right to take that decision to the Ombudsman. If the Ombudsman does not agree that the exclusion has been fairly applied, the Ombudsman may tell the landlord to take on the complaint.	Yes	Corporate complaints policy	Page 4
2.5	Landlords must not take a blanket approach to excluding complaints; they must consider the individual circumstances of each complaint.	Yes	Corporate complaints policy	Page 6

Section 3: Accessibility and Awareness

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
3.1	Landlords must make it easy for residents to complain by providing different channels through which they can make a complaint. Landlords must consider their duties under the Equality Act 2010 and anticipate the needs and reasonable adjustments of residents who may need to access the complaints process.	Yes	Corporate complaints policy	Page 6, 10
3.2	Residents must be able to raise their complaints in any way and with any member of staff. All staff must be aware of the complaints process and be able to pass details of the complaint to the appropriate person within the landlord.	Yes	Corporate complaints policy	Page 6 Mandatory complaints training. Internal communications about everyone's responsibility.
3.3	High volumes of complaints must not be seen as a negative, as they can be indicative of a well-publicised and accessible complaints process. Low complaint volumes are potentially a sign that residents are unable to complain.	Yes		History of encouraging and welcoming complaints. Numbers of complaints will be published in quarterly and annual complaints reports.

3.4	Landlords must make their complaint policy available in a clear and accessible format for all residents. This will detail the two stage process, what will happen at each stage, and the timeframes for responding. The policy must also be published on the landlord's website.	Yes	Corporate complaints policy	Page 6
3.5	The policy must explain how the landlord will publicise details of the complaints policy, including information about the Ombudsman and this Code.	Yes	Corporate complaints policy	Page 8
3.6	Landlords must give residents the opportunity to have a representative deal with their complaint on their behalf, and to be represented or accompanied at any meeting with the landlord.	Yes	Corporate complaints policy	Page 6
3.7	Landlords must provide residents with information on their right to access the Ombudsman service and how the individual can engage with the Ombudsman about their complaint.	Yes	<ul style="list-style-type: none"> • Corporate complaints policy <ul style="list-style-type: none"> • Website • Acknowledgement letter • Stage response letters 	Page 8

Section 4: Complaint Handling Staff

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
4.1	Landlords must have a person or team assigned to take responsibility for complaint handling, including liaison with the Ombudsman and ensuring complaints are reported to the governing body (or equivalent). This Code will refer to that person or team as the 'complaints officer'. This role may be in addition to other duties.	Yes		<ul style="list-style-type: none"> • Feedback Officer administers all complaints. • Customer Experience Team leader is Ombudsman liaison. • Customer Service Team Manager CLT/ Member liaison
4.2	The complaints officer must have access to staff at all levels to facilitate the prompt resolution of complaints. They must also have the authority and autonomy to act to resolve disputes promptly and fairly.	Yes	Feedback officer doesn't have authority or autonomy. Clarified with HOS, Response as follows: <i>'a complaints officer should have the authority to act to resolve disputes. However, we acknowledge that landlords will have differing internal processes for offering a complaint resolution such as delegation schemes or individual compensation limits. In these scenarios, the landlord should instead ensure the process for obtaining the necessary authorisation is swift and does not delay complaint responses being provided within the timescales set out in the Code.'</i>	

			Our policy accounts for director and CEO signoff of complaints within the relevant time frames.	
4.3	Landlords are expected to prioritise complaint handling and a culture of learning from complaints. All relevant staff must be suitably trained in the importance of complaint handling. It is important that complaints are seen as a core service and must be resourced to handle complaints effectively	Yes	Skillsgate mandatory training	

Section 5: The Complaint Handling Process

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
5.1	Landlords must have a single policy in place for dealing with complaints covered by this Code. Residents must not be treated differently if they complain.	Yes	Corporate complaints policy	
5.2	The early and local resolution of issues between landlords and residents is key to effective complaint handling. It is not appropriate to have extra named stages (such as 'stage 0' or 'informal complaint') as this causes unnecessary confusion.	Yes	Corporate complaints policy	Clear that there are two stages. All officers have been instructed that they must not deal with complaints informally as part of the internal training on the new codes / policy
5.3	A process with more than two stages is not acceptable under any	Yes	Corporate complaints policy	

	circumstances as this will make the complaint process unduly long and delay access to the Ombudsman.			
5.4	Where a landlord's complaint response is handled by a third party (e.g. a contractor or independent adjudicator) at any stage, it must form part of the two stage complaints process set out in this Code. Residents must not be expected to go through two complaints processes.	Yes	Corporate complaints policy	Page 8
5.5	Landlords are responsible for ensuring that any third parties handle complaints in line with the Code.	Yes	Corporate complaints policy	Page 8
5.6	When a complaint is logged at Stage 1 or escalated to Stage 2, landlords must set out their understanding of the complaint and the outcomes the resident is seeking. The Code will refer to this as "the complaint definition". If any aspect of the complaint is unclear, the resident must be asked for clarification.	Yes	Corporate complaints policy	Page 7
5.7	When a complaint is acknowledged at either stage, landlords must be clear which aspects of the complaint they are, and are not, responsible for and	Yes	Corporate complaints policy	Page 7

	clarify any areas where this is not clear.			
5.8	<p>At each stage of the complaints process, complaint handlers must:</p> <ul style="list-style-type: none"> a. deal with complaints on their merits, act independently, and have an open mind; b. give the resident a fair chance to set out their position; c. take measures to address any actual or perceived conflict of interest; and d. consider all relevant information and evidence carefully. 	Yes	Corporate complaints policy	<p>Page 7</p> <p>Corporate Director sign off of Stage 1 complaints</p> <p>Chief Executive sign off of stage 2 complaints ensures compliance.</p>
5.9	Where a response to a complaint will fall outside the timescales set out in this Code, the landlord must agree with the resident suitable intervals for keeping them informed about their complaint.	Yes	Corporate complaints policy	Page 7,8
5.10	Landlords must make reasonable adjustments for residents where appropriate under the Equality Act 2010. Landlords must keep a record of any reasonable adjustments agreed, as well as a record of any disabilities a resident has disclosed. Any agreed reasonable adjustments must be kept under active review.	Yes	Corporate complaints policy	Page 10

5.11	Landlords must not refuse to escalate a complaint through all stages of the complaints procedure unless it has valid reasons to do so. Landlords must clearly set out these reasons, and they must comply with the provisions set out in section 2 of this Code.	Yes	Corporate complaints policy	Page 5
5.12	A full record must be kept of the complaint, and the outcomes at each stage. This must include the original complaint and the date received, all correspondence with the resident, correspondence with other parties, and any relevant supporting documentation such as reports or surveys.	Yes		Corporate complaints system House on the Hill is a full case management system.
5.13	Landlords must have processes in place to ensure a complaint can be remedied at any stage of its complaints process. Landlords must ensure appropriate remedies can be provided at any stage of the complaints process without the need for escalation.	Yes	Corporate complaints policy	Page 9
5.14	Landlords must have policies and procedures in place for managing unacceptable behaviour from residents and/or their representatives. Landlords must be able to evidence reasons for putting any restrictions in place and	Yes	Corporate complaints policy	Page 10

	must keep restrictions under regular review.			
5.15	Any restrictions placed on contact due to unacceptable behaviour must be proportionate and demonstrate regard for the provisions of the Equality Act 2010.	Yes	Unreasonable Behaviour and Communication Policy	<ul style="list-style-type: none"> • Unreasonable communications policy • EIA on policy

Section 6: Complaints Stages

Stage 1

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
6.1	Landlords must have processes in place to consider which complaints can be responded to as early as possible, and which require further investigation. Landlords must consider factors such as the complexity of the complaint and whether the resident is vulnerable or at risk. Most stage 1 complaints can be resolved promptly, and an explanation, apology or resolution provided to the resident.	Yes		This is our standard practice
6.2	Complaints must be acknowledged, defined and logged at stage 1 of the complaints procedure <u>within five working days of the complaint being received.</u>	Yes	Corporate complaints policy	
6.3	Landlords must issue a full response to stage 1 complaints <u>within 10 working days</u> of the complaint being acknowledged.	No	Corporate complaints policy	Our Corporate Complaints policy complies with the complaint code. However, in the past year, we achieved a 70% response rate within the specified timeframe, falling short of the 100% target. This shortfall is due

				to various factors, including capacity issues and vacant positions. Ensuring timely responses remains a priority for the Council, with adherence to complaint deadlines being a key performance indicator in our corporate plan for 2025/26. These key performance indicators are monitored quarterly and presented to both the Cabinet and Scrutiny Committee.
6.4	Landlords must decide whether an extension to this timescale is needed when considering the complexity of the complaint and then inform the resident of the expected timescale for response. Any extension must be no more than 10 working days without good reason, and the reason(s) must be clearly explained to the resident.	Yes	Corporate complaints policy	Page 7
6.5	When an organisation informs a resident about an extension to these timescales, they must be provided with the contact details of the Ombudsman.	Yes	Corporate complaints policy	Page 7
6.6	A complaint response must be provided to the resident when the answer to the complaint is known, not when the outstanding actions required to address	Yes	Corporate complaints policy	Page 7

	the issue are completed. Outstanding actions must still be tracked and actioned promptly with appropriate updates provided to the resident.			
6.7	Landlords must address all points raised in the complaint definition and provide clear reasons for any decisions, referencing the relevant policy, law and good practice where appropriate.	Yes	Corporate complaints policy	Page 7
6.8	Where residents raise additional complaints during the investigation, these must be incorporated into the stage 1 response if they are related and the stage 1 response has not been issued. Where the stage 1 response has been issued, the new issues are unrelated to the issues already being investigated or it would unreasonably delay the response, the new issues must be logged as a new complaint.	Yes	Corporate complaints policy	Page 8
6.9	Landlords must confirm the following in writing to the resident at the completion of stage 1 in clear, plain language: <ul style="list-style-type: none"> a. the complaint stage; b. the complaint definition; c. the decision on the complaint; d. the reasons for any decisions made; e. the details of any remedy offered to put things right; 	Yes		Letter templates available if required

	f. details of any outstanding actions; and g. details of how to escalate the matter to stage 2 if the individual is not satisfied with the response.			
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Stage 2

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
6.10	If all or part of the complaint is not resolved to the resident's satisfaction at stage 1, it must be progressed to stage 2 of the landlord's procedure. Stage 2 is the landlord's final response.	Yes	Corporate complaints policy	Page 8
6.11	Requests for stage 2 must be acknowledged, defined and logged at stage 2 of the complaints procedure within five working days of the escalation request being received.	Yes	Corporate complaints policy	Page 8
6.12	Residents must not be required to explain their reasons for requesting a stage 2 consideration. Landlords are expected to make reasonable efforts to understand why a resident remains unhappy as part of its stage 2 response.	Yes	Corporate complaints policy	
6.13	The person considering the complaint at stage 2 must not be the same person that considered the complaint at stage 1.	Yes	Corporate complaints policy	Page 8

6.14	Landlords must issue a final response to the stage 2 <u>within 20 working days</u> of the complaint being acknowledged.	No	Corporate complaints policy	Our Corporate Complaints policy complies with the complaint code. However, in the past year, we achieved a 70% response rate within the specified timeframe, falling short of the 100% target. This shortfall is due to various factors, including capacity issues and vacant positions. Ensuring timely responses remains a priority for the Council, with adherence to complaint deadlines being a key performance indicator in our corporate plan for 2025/26. These key performance indicators are monitored quarterly and presented to both the Cabinet and Scrutiny Committee
6.15	Landlords must decide whether an extension to this timescale is needed when considering the complexity of the complaint and then inform the resident of the expected timescale for response. Any extension must be no more than 20 working days without good reason, and the reason(s) must be clearly explained to the resident.	Yes	Corporate complaints policy	Page 8

6.16	When an organisation informs a resident about an extension to these timescales, they must be provided with the contact details of the Ombudsman.	Yes		Holding letter template can be provided if required.
6.17	A complaint response must be provided to the resident when the answer to the complaint is known, not when the outstanding actions required to address the issue are completed. Outstanding actions must still be tracked and actioned promptly with appropriate updates provided to the resident.	Yes	Corporate complaints policy	Page 8
6.18	Landlords must address all points raised in the complaint definition and provide clear reasons for any decisions, referencing the relevant policy, law and good practice where appropriate.	Yes	Corporate complaints policy	Page 8
6.19	Landlords must confirm the following in writing to the resident at the completion of stage 2 in clear, plain language: a. the complaint stage; b. the complaint definition; c. the decision on the complaint; d. the reasons for any decisions made; e. the details of any remedy offered to put things right; f. details of any outstanding actions; and g. details of how to escalate the matter to the Ombudsman	Yes		Letter templates available if required.

	Service if the individual remains dissatisfied.			
6.20	Stage 2 is the landlord's final response and must involve all suitable staff members needed to issue such a response.	Yes	Corporate complaints policy	Page 8

Section 7: Putting things right

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
7.1	<p>Where something has gone wrong a landlord must acknowledge this and set out the actions it has already taken, or intends to take, to put things right. These can include:</p> <ul style="list-style-type: none"> • Apologising; • Acknowledging where things have gone wrong; • Providing an explanation, assistance or reasons; • Taking action if there has been delay; • Reconsidering or changing a decision; • Amending a record or adding a correction or addendum; • Providing a financial remedy; • Changing policies, procedures or practices. 	Yes		Normal practice but letter templates are available on request.

7.2	Any remedy offered must reflect the impact on the resident as a result of any fault identified.	Yes	Corporate complaints policy	Page 9
7.3	The remedy offer must clearly set out what will happen and by when, in agreement with the resident where appropriate. Any remedy proposed must be followed through to completion.	Yes	Compensation Policy Final.pdf	Response templates are clear as to how remedies should be set out. Feedback officer follows through to completion.
7.4	Landlords must take account of the guidance issued by the Ombudsman when deciding on appropriate remedies.	Yes	Compensation Policy Final.pdf	

Section 8: Putting things right

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
8.1	<p>Landlords must produce an annual complaints performance and service improvement report for scrutiny and challenge, which must include:</p> <ul style="list-style-type: none"> a. the annual self-assessment against this Code to ensure their complaint handling policy remains in line with its requirements. b. a qualitative and quantitative analysis of the landlord's complaint handling performance. This must also include a summary of the types of complaints the landlord has refused to accept; c. any findings of non-compliance with this Code by the Ombudsman; d. the service improvements made as a result of the learning from complaints; e. any annual report about the landlord's performance from the Ombudsman; and f. any other relevant reports or publications produced by the Ombudsman in relation to the work of the landlord. 	Yes	2023/24 NORTH WEST LEICESTERSHIRE DISTRICT COUNCIL	

8.2	The annual complaints performance and service improvement report must be reported to the landlord's governing body (or equivalent) and published on the on the section of its website relating to complaints. The governing body's response to the report must be published alongside this.	Yes	<u>NORTH WEST LEICESTERSHIRE DISTRICT COUNCIL</u>	
8.3	Landlords must also carry out a self-assessment following a significant restructure, merger and/or change in procedures.	Yes		Not evidenced in policy, but officers are aware of the requirement
8.4	Landlords may be asked to review and update the self-assessment following an Ombudsman investigation.	Yes		Not evidenced in policy, but officers are aware of the requirement
8.5	If a landlord is unable to comply with the Code due to exceptional circumstances, such as a cyber incident, they must inform the Ombudsman, provide information to residents who may be affected, and publish this on their website Landlords must provide a timescale for returning to compliance with the Code.	Yes		

Section 9: Scrutiny & oversight: continuous learning and improvement

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
9.1	Landlords must look beyond the circumstances of the individual complaint and consider whether service improvements can be made as a result of any learning from the complaint.	Yes	Lessons learnt and service reviews	Root Cause with services
9.2	A positive complaint handling culture is integral to the effectiveness with which landlords resolve disputes. Landlords must use complaints as a source of intelligence to identify issues and introduce positive changes in service delivery.	Yes	Corporate complaints policy	Page 3
9.3	Accountability and transparency are also integral to a positive complaint handling culture. Landlords must report back on wider learning and improvements from complaints to stakeholders, such as residents' panels, staff and relevant committees.	Yes		Scrutiny Portfolio holder updates Tenant panels Tenant InTouch newsletter
9.4	Landlords must appoint a suitably senior lead person as accountable for their complaint handling. This person must assess any themes or trends to identify potential systemic issues, serious risks, or policies and procedures that require revision.	Yes		Customer Experience Team leader Customer service team manager.

9.5	In addition to this a member of the governing body (or equivalent) must be appointed to have lead responsibility for complaints to support a positive complaint handling culture. This person is referred to as the Member Responsible for Complaints ('the MRC').	Yes		Portfolio holder for housing, property and Customer services
9.6	The MRC will be responsible for ensuring the governing body receives regular information on complaints that provides insight on the landlord's complaint handling performance. This person must have access to suitable information and staff to perform this role and report on their findings.	Yes		Portfolio holder for housing, property and Customer services
9.7	As a minimum, the MRC and the governing body (or equivalent) must receive: <ul style="list-style-type: none"> a. regular updates on the volume, categories and outcomes of complaints, alongside complaint handling performance; b. regular reviews of issues and trends arising from complaint handling; c. regular updates on the outcomes of the Ombudsman's investigations and progress made in complying with orders related to severe maladministration findings; and 			Quarterly complaints report is sent to portfolio holder for housing, property and customer services.

	d. annual complaints performance and service improvement report.			
9.8	<p>Landlords must have a standard objective in relation to complaint handling for all relevant employees or third parties that reflects the need to:</p> <p>a. have a collaborative and co-operative approach towards resolving complaints, working with colleagues across teams and departments;</p> <p>b. take collective responsibility for any shortfalls identified through complaints, rather than blaming others; and</p> <p>c. act within the professional standards for engaging with complaints as set by any relevant professional body.</p>	Yes		This is our normal practice / culture

Housing
Ombudsman Service

LANDLORD PERFORMANCE REPORT

2023/2024

North West Leicestershire District Council

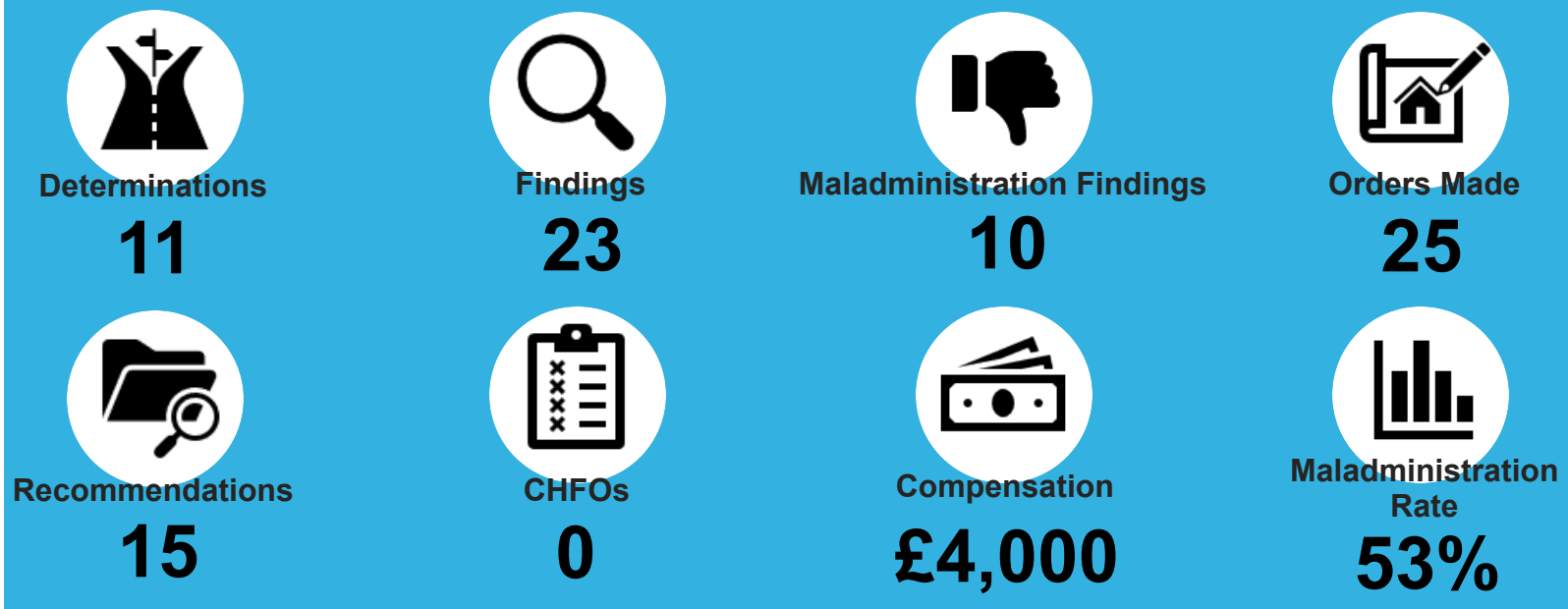
[North West Leicestershire District Council](#)

Landlord: North West Leicestershire District Council

Landlord Homes: 4,169

Landlord Type: Local Authority / ALMO or TMO

PERFORMANCE AT A GLANCE



PERFORMANCE 2022-2023



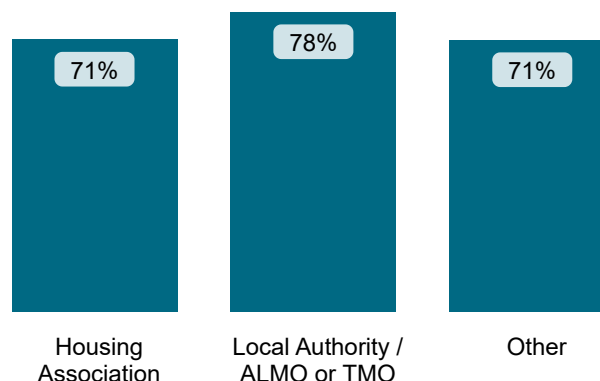
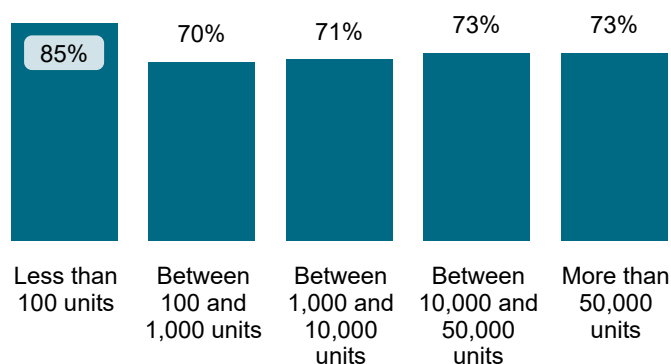
Maladministration Rate *Comparison* | Cases determined between April 2023 - March 2024

NATIONAL MALADMINISTRATION RATE: 73%

The landlord performed well when compared to similar landlords by size and type.

National Mal Rate by Landlord Size: Table 1.1

by Landlord Type: Table 1.2



Findings Comparison | *Cases determined between April 2023 - March 2024*

National Performance by Landlord Size: Table 2.1

Outcome	Less than 100 units	Between 100 and 1,000 units	Between 1,000 and 10,000 units	Between 10,000 and 50,000 units	More than 50,000 units	Total
Severe Maladministration	14%	6%	4%	8%	7%	7%
Maladministration	35%	37%	41%	42%	43%	42%
Service failure	18%	19%	20%	18%	19%	19%
Mediation	0%	0%	1%	1%	1%	1%
Redress	0%	5%	7%	8%	12%	9%
No maladministration	12%	21%	20%	15%	12%	15%
Outside Jurisdiction	22%	11%	8%	7%	5%	7%
Withdrawn	0%	0%	0%	0%	0%	0%

North West Leicestershire District Council

Outcome	% Findings
Severe Maladministration	4%
Maladministration	30%
Service failure	9%
Mediation	0%
Redress	4%
No maladministration	35%
Outside Jurisdiction	17%
Withdrawn	0%

National Performance by Landlord Type: Table 2.2

Outcome	Housing Association	Local Authority / ALMO or TMO	Other	Total
Severe Maladministration	6%	9%	6%	7%
Maladministration	41%	45%	36%	42%
Service failure	19%	18%	21%	19%
Mediation	1%	1%	0%	1%
Redress	12%	4%	5%	9%
No maladministration	15%	15%	21%	15%
Outside Jurisdiction	6%	9%	11%	7%
Withdrawn	0%	0%	0%	0%

Outcome	% Findings
Severe Maladministration	4%
Maladministration	30%
Service failure	9%
Mediation	0%
Redress	4%
No maladministration	35%
Outside Jurisdiction	17%
Withdrawn	0%

Landlord Findings by Category | *Cases determined between April 2023 - March 2024*

Table 2.3

Category	Severe Maladministration	Maladministration	Service failure	Mediation	Redress	No maladministration	Outside Jurisdiction	Withdrawn	Total
Property Condition	0	4	0	0	0	5	3	0	12
Complaints Handling	0	2	1	0	0	1	1	0	5
Staff	1	0	0	0	1	1	0	0	3
Anti-Social Behaviour	0	1	0	0	0	0	0	0	1
Occupancy Rights	0	0	1	0	0	0	0	0	1
Reimbursement and Payments	0	0	0	0	0	1	0	0	1
Total	1	7	2	0	1	8	4	0	23

Findings by Category Comparison | Cases determined between April 2023 - March 2024

Top Categories for North West Leicestershire District Council

Table 3.1

Category	# Landlord Findings	% Landlord Maladministration	% National Maladministration
Property Condition	9	44%	73%
Complaints Handling	4	75%	84%
Staff	3	33%	48%

National Maladministration Rate by Landlord Size:

Table 3.2

Category	Less than 100 units	Between 100 and 1,000 units	Between 1,000 and 10,000 units	Between 10,000 and 50,000 units	More than 50,000 units	% Landlord Maladministration
Complaints Handling	100%	87%	87%	86%	81%	75%
Property Condition	75%	63%	72%	74%	74%	44%
Staff	67%	63%	47%	49%	46%	33%

National Maladministration Rate by Landlord Type:

Table 3.3

Category	Housing Association	Local Authority / ALMO or TMO	Other	% Landlord Maladministration
Complaints Handling	81%	91%	91%	75%
Property Condition	72%	77%	59%	44%
Staff	48%	50%	50%	33%

Findings by Sub-Category | Cases Determined between April 2023 - March 2024

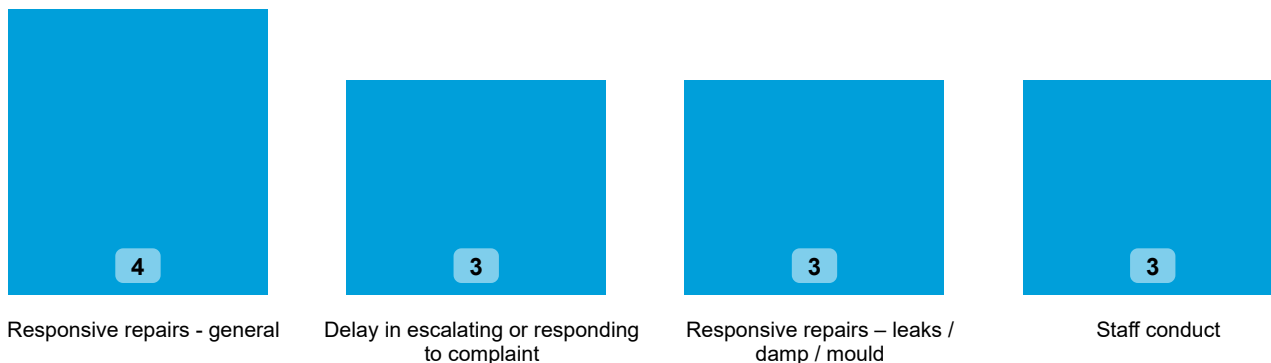
Table 3.4

Highlighted Service Delivery Sub-Categories only:

Sub-Category	Severe Maladministration	Maladministration	Service failure	Mediation	Redress	No maladministration	Outside Jurisdiction	Withdrawn	Total
Responsive repairs - general	0	1	0	0	0	3	2	0	6
Responsive repairs – leaks / damp / mould	0	2	0	0	0	1	0	0	3
Staff conduct	1	0	0	0	1	1	0	0	3
Noise	0	1	0	0	0	0	0	0	1
Pest control (within property)	0	0	0	0	0	0	1	0	1
Total	1	4	0	0	1	5	3	0	14

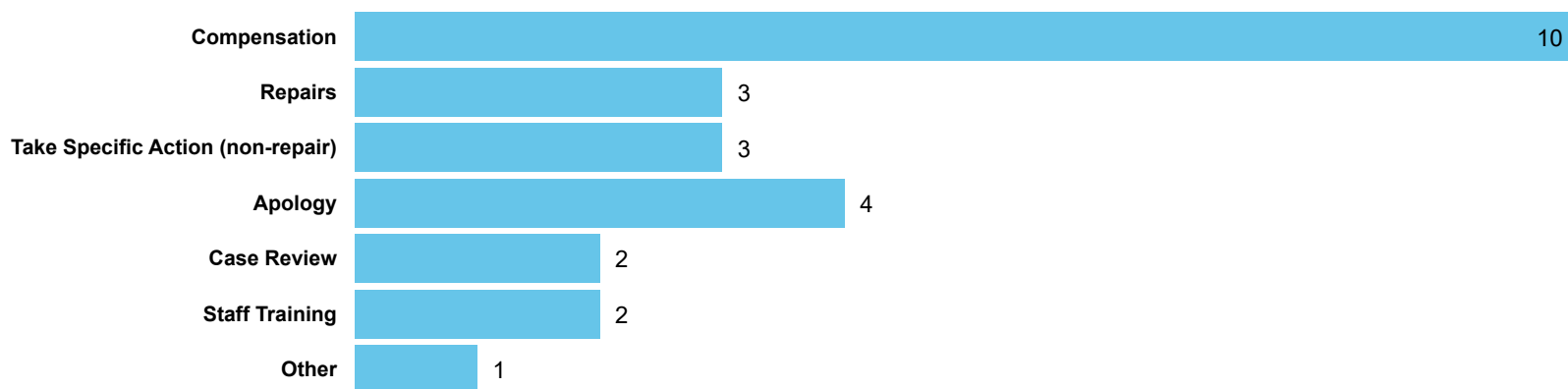
Top Sub-Categories | *Cases determined between April 2023 - March 2024*

Table 3.5



Orders Made by Type | *Orders on cases determined between April 2023 - March 2024*

Table 4.1



Order Compliance | *Order target dates between April 2023 - March 2024*

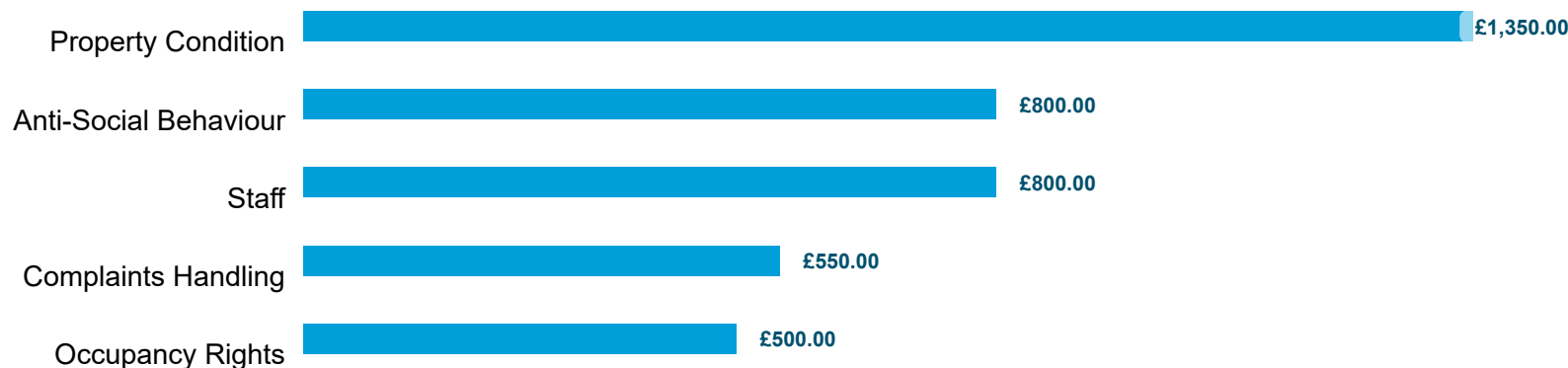
Table 4.2

Order	Within 3 Months	
Complete?	Count	%
Complied	25	100%
Total	25	100%

Compensation Ordered | *Cases Determined between April 2023 - March 2024*

Table 5.1

● Ordered ● Recommended



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Item	Details
Reference:	Unreasonable behaviour and communication policy
Status:	Final
Originator:	Nichola Oliver
Owner:	Nichola Oliver
Version No:	1
Date:	1 April 2025

Unreasonable Behaviour and Communication Policy

Key policy details

Approvals

Item	Date of Approval	Version No.
Consulted with Legal Services and CLT	August 2023	
Reviewed by Corporate Scrutiny	TBA	
Approved by Cabinet	TBA	

Policy Location

This policy can be found at [Complaints, compliments, comments - North West Leicestershire District Council](#)

Equality Impact Assessment (EIA)

Completed by	Completion date
Nichola Oliver	September 2023

Revision history

Version Control	Revision Date	Summary of Changes

Policy Review Plans

This policy is subject to a scheduled review once every two years or earlier if there is a change in legislation or local policy that requires it.

Distribution

Title	Date of Issue	Version No.
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Website		

Unreasonable Behaviour and Communication

1 Introduction

North West Leicestershire District Council welcomes feedback from customers on our services. We take complaints seriously, and treat them as an opportunity to improve our services. We are committed to dealing with all complaints fairly and impartially and to providing a high quality service to the person who made the complaint. Many complaints are able to be resolved very quickly.

Occasionally, the behaviour or actions of individuals using our Services makes it very difficult for us to deal with their enquiry. In a small number of cases the actions of individuals become unacceptable because they involve abuse of our staff or our process.

When this happens, we have to take action to protect the health and wellbeing of our staff who have a right to do their jobs without fear of being abused or harassed. We also consider the impact of the behaviour on our ability to do our work and provided a service to others.

As a result, the Council has developed this policy to set out how it deals with unreasonable behaviour and communication.

2. Aim of Policy

The aim of this policy is to contribute to the Council's overall aim of dealing with all Complaints and enquiries in a courteous, fair and consistent manner. It should be read in conjunction with the Council's Corporate Complaints and Feedback Policy.

It sets out how the Council will decide if a Customer will be treated as an 'unreasonable' what it will do in those circumstances.

It is important to distinguish between a customer who makes a number of complaints and enquiries, because they genuinely believe that the Council was at fault, and customers who are being difficult. It is recognised that customers may sometimes act out of character at times of anxiety or distress.

This policy has been drafted with regards to the Local Government Ombudsman's (LGO) Guidance note on 'unreasonably persistent complainants' and 'unreasonable complainant behaviour' and the Housing Ombudsman complaints code of conduct.

3. Definition of Unreasonable Behaviour and Communication.

North West Leicestershire District Council has adopted the definitions provided by the Local Government Ombudsman (LGO):

Unreasonable Behaviour and Communication is when behaviour becomes aggressive/abusive and/or those complainants who, because of the nature or frequency of their contacts with an organisation, hinder the organisation's consideration of their, or other people's, complaints.

For the Council, unreasonable behaviour is where the frequency or nature of a customer's contact with us takes up unjustifiable officer time and resources, making it hard for us to handle their complaint or enquiry and/or those of other people, or where their behaviour is offensive or abusive.

4. Actions and behaviours of unreasonable communication.

Listed below are some examples of the actions and behaviours of unreasonable communication based on those defined by the Local Government and Housing Ombudsman. This is not an exhaustive list.

This policy does not address the issues of health and safety but sits along side existing Council policies and guidance regarding violence at work, as a means of addressing the full spectrum of behaviours that the Council might have to address.

- If anger escalates into aggression towards Council officers, we consider that unacceptable. Any violence or abuse towards staff will not be tolerated. Violence is not restricted to acts of aggression that may result in physical harm. It also includes behaviour or language (whether verbal or written) that may cause staff to feel offended, afraid, threatened or abused.

Unacceptable language is that which:

- Is offensive, derogatory or patronising,
- Is discriminatory in any way, including racist, sexist, homophobic or transphobic comments; or
- Makes serious allegations that individuals have committed criminal, corrupt or perverse conduct without any evidence.
- Refusing to specify the grounds for a complaint, despite offers of assistance from Council staff;
- Refusing to co-operate with the complaints investigation process while still wishing their complaint to be resolved;
- Refusing to accept that issues are not within the remit of a complaints' procedure despite having been provided with information about the procedure's scope;
- Insisting on the complaint being dealt with in ways which are incompatible with the adopted complaints' procedure or with good practice;
- Making what appear to be groundless complaints about the staff dealing with the complaints, and seeking to have them replaced.
- Changing the basis of the complaint as the investigation proceeds and/or denying statements he or she made at an earlier stage;
- Introducing trivial or irrelevant new information which the complainant expects to be taken into account and commented on, or raising large numbers of detailed but unimportant questions and insisting they are all fully answered;
- Electronically recording meetings and conversations without prior knowledge and consent of the other persons involved;
- Adopting a 'scattergun' approach: pursuing a complaint or complaints with the Council and, at the same time, with other people or bodies such as the Member of Parliament / a Councillor / the district auditor / local police / solicitors / the Ombudsman;
- Making unnecessarily excessive demands on the time and resources of staff whilst a complaint is being looked into, for example, excessive telephoning or sending emails to numerous Council staff, writing lengthy complex letters every few days and expecting immediate responses;
- Submitting repeated complaints, after complaints processes have been completed, essentially about the same issues, with additions / variations which the complainant insists make these 'new' complaints worthy of being put through the full complaints' procedure; and / or
- Refusing to accept the decision on a complaint – repeatedly arguing the point and complaining about the decision.

Customers may be deemed to be Potentially Violent in any situation where physical violence has been used or threatened towards staff or their families/associates at any time. This will cause personal contact with the customer to be discontinued and the complaint or enquiry will, thereafter, only be pursued through written communication. All such incidents should be documented and reported in accordance with Potentially Violent Person Policy, also reporting where appropriate, to the police.

Raising legitimate queries or criticisms of a complaints' procedure as it progresses, for example if agreed timescales are not met, should not in itself lead to someone being regarded as 'unreasonable'. Similarly, the fact that a complainant is unhappy with the outcome of a complaint and seeks to challenge it once, or more than once, should not necessarily cause him or her to be labelled 'unreasonable'. If the complaints procedure is operating properly, then responding to expressions of dissatisfaction and requests for information should not cause the Council any particular problems.

5. Considerations prior to taking action under the policy

Different considerations will apply depending on whether an investigation into the complaint or query is ongoing or whether it has been concluded. However, where the issue is ongoing the Council will need to continue some contact with the individual.

The decision to designate someone as unreasonable is onerous and could have serious consequences for the individual.

Before deciding whether the policy should be applied the Council should be satisfied that:

- The complaint/query is being or has been properly investigated
- Any decision reached is the right one
- Communications with the customer have been adequate
- The customer is not providing any significant new information that might affect the Council's view on the matter
- Any circumstances relating to the customer's mental health, age, gender, sexual orientation, religious belief, language or disability have been considered
- The Council's Complaints and Information Governance policies has been applied correctly
- The customer has been made fully aware of their rights to appeal through the Ombudsman or other organisation.
- We have been impartial and objective.
- The customer behaviour is unproportional to the enquiry/complaint. Somebody who is upset, emotional, angry or loud is not necessarily being unreasonable.

If the Council is satisfied on these points, it will consider whether further action is necessary prior to taking the decision to designate the behaviour as unreasonable behaviour/communication. Examples might include:

- If no meeting has taken place between the customer and an officer /officers, and where it is appropriate to do so, consider offering the individual a meeting with an officer of appropriate seniority. Sometimes meetings can dispel misunderstandings and move matters towards a resolution. The Council does not, however, guarantee a meeting and will offer one dependent on the particular circumstances of the case.

- If more than one service is being contacted, consider:
 - a) setting up a strategy meeting to agree a cross-service approach; and/or
 - b) designating a key officer to co-ordinate the authority's response(s).

Before applying any restrictions in line with this policy the customer will be notified by phone, in writing or by email explaining that if his/her actions continue the authority may decide to treat him/her as unreasonable, an explanation why and warning of potential action the Council may take (with reference to this policy) if the problem persists.

6. Approach

How the Council manages such correspondence will be dependent upon the nature and extent. If their persistence adversely affects the Council's ability to carry out its functions and provide a service to others, it may need to manage their unreasonable behavior/communication by restricting contact with staff.

Any restrictions applied will be appropriate and proportionate. The following are examples of the types of restriction(s) which may be used:

- a) Placing time limits on telephone conversations and personal contacts.
- b) Restricting the number of telephone calls that will be taken (for example, one call on one specified morning /afternoon of any week).
- c) Limiting the customer to one medium of contact (telephone, letter, email etc) and/or requiring the customer to communicate only with one named officer.
- d) Requiring any personal contacts to take place in the presence of a witness.
- e) Refusing to register and process further complaints/correspondence about the same matter.
- f) Where a decision on the complaint/query has been made, providing the customer with acknowledgements only of letters, faxes, or e mails, or ultimately informing the customer that future correspondence will be read and placed on the file but not acknowledged.

In deciding which restrictions are appropriate, careful consideration will be given to balancing the rights of the individual against those of other customers and of staff and members as well as the need for the Council to provide its services.

Where the behaviour is so extreme or it threatens the immediate safety and welfare of staff, we will consider other options, for example reporting the matter to the police or taking legal action. In such cases the Council may not give the individual prior warning of that action.

7. Challenging the council's decision

Customers may challenge the decision to apply the unreasonable behaviour/communication policy and/or the restrictions imposed by writing to the Chief Executive. This challenge must be made within 21 days of the date of the letter. This will be considered, and the customer notified of the outcome.

To challenge the decision please email or write to:

Email: feedback@nwleicestershire.gov.uk

Address: North West Leicestershire District Council

PO Box 11051
Coalville
LE67 0FW

The customer may make a complaint about the way they been treated to the Local Government Ombudsman at any time during the process.

Local Government Ombudsman

Contact details for the Local Government Ombudsman are:
Local Government Ombudsman
PO Box 4771
Coventry
CV4 0EH

Telephone: 0300 061 0614
Website: www.lgo.org.uk/making-a-complaint

Housing Ombudsman

Contact details for the Housing Ombudsman are:
Housing Ombudsman Service
PO Box 1484
Unit D
Preston
PR2 0ET

Telephone: 0300 111 3000
Website: www.housing-ombudsman.org.uk

NORTH WEST LEICESTERSHIRE DISTRICT COUNCIL

CORPORATE SCRUTINY COMMITTEE – THURSDAY, 19
JUNE 2025

Title of Report	PEER REVIEW FEEDBACK FOLLOW UP	
Presented by	Andy Barton Strategic Director	
Background Papers	Reports to Corporate Scrutiny Committee and Cabinet December 2024	Public Report: Yes
Financial Implications	There are no financial implications from this report.	
	Signed off by the Section 151 Officer: Yes	
Legal Implications	None directly relating to the Peer Review Progress Review report.	
	Signed off by the Monitoring Officer: Yes	
Staffing and Corporate Implications	Staff and Trade Union engagement on developing proposals for Local Government Reorganisation will continue in the lead up to final proposals being submitted to Government in November and beyond to ensure staff are well supported.	
	Signed off by the Head of Paid Service: Yes	
Purpose of Report	To update Cabinet on the Council's progress in addressing the recommendations of the Local Government Association's Corporate Peer Challenge.	
Reason for Decision	Corporate Scrutiny Committee is responsible for holding Cabinet to account to ensure all necessary arrangements are put in place to ensure the priorities identified by the Council are delivered within the budget and policy framework. The Corporate Peer Challenge Action Plan that the Committee considered and Cabinet agreed in December 2024 will assist in delivering those priorities.	
Recommendations	THAT CORPORATE SCRUTINY COMMITTEE: 1) WELCOMES THE POSITIVE PROGRESS IDENTIFIED BY THE LOCAL GOVERNMENT ASSOCIATION (LGA) ON THE COUNCIL'S IMPLEMENTATION OF ITS CORPORATE PEER CHALLENGE RECOMMENDATIONS.	

	<p>2) PROVIDES COMMENTS ON THE LGA'S PEER REVIEW PROGRESS REPORT TO INFORM CABINET'S CONSIDERATION OF THE REPORT ON 24 JUNE 2025.</p> <p>3) NOTES THE COMMENTARY MADE BY THE LGA ON FURTHER ENGAGEMENT OF STAFF, ELECTED MEMBERS, STAKEHOLDERS AND PARTNERS TO SUPPORT THE SUBMISSION OF FINAL PROPOSALS ON LOCAL GOVERNMENT REORGANISATION WHICH CABINET WILL BE ASKED TO ENDORSE.</p>
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1.0 BACKGROUND

- 1.1 The Council undertook a Local Government Association (LGA) Corporate Peer Challenge (CPC) during June 2024 and published the full report with an action plan to address the recommendations contained in the report. The action plan was considered by Corporate Scrutiny Committee and approved by Cabinet in December 2024.
- 1.2 In April 2025, the LGA Peer Team who conducted the CPC returned for a follow up visit for to consider the progress that had been made. The Progress Review is an integral part of the CPC process. Taking place approximately ten months after the CPC, it is designed to provide space for the council's senior leadership to:
- Receive feedback from peers on the early progress made by the Council against the CPC recommendations and the Council's RAG rated CPC Action Plan (attached at Appendix 1 to the report).
 - Consider peer's reflections on any new opportunities or challenges that may have arisen since the peer team were 'on-site' including any further support needs
 - Discuss any early impact or learning from the progress made to date.
- 1.3 This Progress Review was the next step in an ongoing, open and close relationship that the Council has with LGA sector support.

2.0 SUMMARY OF THE APPROACH

- 2.1 The Progress Review took place on site on 1-2 April 2025. It focussed on each of the recommendations from the CPC, under the following theme headings:
- Governance and finance
 - Communications
 - Transformation
 - Housing
 - Looking forward
- 2.2 For this Progress Review, the following members of the original CPC team were involved:
- Cllr Abi Brown OBE, Stoke-on-Trent City Council
 - Larissa Reed, Swale Borough Council

- Paul Bellotti, East Riding of Yorkshire Council and;
- Judith Hurcombe, Local Government Association

2.3 Progress Review Feedback - Out of the CPC's seven recommendations, the Council's Red-Amber-Green (RAG) rated action plan reported progress on all of those recommendations and the peer team could see evidence of that progress.

2.4 A copy of the full report from the LGA is attached at Appendix 2.

3.0 FINANCIAL CONSIDERATIONS

3.1 There are no financial considerations directly related to this report, however, any financial implications of continuing to make progress against the actions identified will be considered as part of the 2025/6 budget process, with approvals as appropriate in line with the Council's Constitution.

3.2 Finances associated with the development of proposals for Local Government Reorganisation have already been identified by Council at its budget meeting in February 2025.

4.0 NEXT STEPS

4.1 The Council will continue to implement the action plan that was agreed by Cabinet in December. The Corporate Leadership Team will continue to track progress against it as part of its ongoing performance management arrangements.

4.2 The Peer Team acknowledged that the work undertaken by Council's in collaboration with staff, partners and other stakeholders was "ahead of the game" in the lead up to the submission of interim proposals for Local Government Reorganisation. Further engagement with staff, elected members and a wide variety of stakeholders and partners is planned in the lead up to final proposals being submitted in November 2025 and Cabinet will be asked to endorse this activity.

4.3 Corporate Scrutiny Committee is asked to provide any comments on the LGA's Peer Review Feedback report to inform Cabinet's consideration of the report on 24 June 2025.

4.4 Cabinet will be asked to agree that the Council publishes the follow up report on its website.

Policies and other considerations, as appropriate	
Council Priorities:	Planning and regeneration Communities and housing Clean, green and Zero Carbon A well-run council
Policy Considerations:	Medium Term Financial Plan Risk Management Strategy Housing Revenue Account Housing Asset Management Housing Repairs Policy Damp and Mould Policy Coalville and District-wide Regeneration Frameworks Communications Strategy Constitution Treasury Management Strategy Equality and Diversity Strategy Transformation Plan.
Safeguarding:	None arising from the report.
Equalities/Diversity:	None arising from the report. Equality Impact Assessments were identified in the initial report and work continues on embedding these in revised policies.
Customer Impact:	None arising from the report.
Economic and Social Impact:	Good progress was identified in relation to the work on the Freeport.
Environment, Climate Change and Zero Carbon:	None arising directly from the follow up visit.
Consultation/Community/Tenant Engagement:	The Peer Review Team conducted a number of follow up interviews with Cabinet members, elected members and staff as part of the follow up visit. Engagement with staff, elected members and partners as a result of the follow up comments on local government reorganisation and devolution will take place in the lead up to the final submission of proposals in November 2028. The follow up report will be published on the Council's website.
Risks:	That the report is not adequately considered and as a result the Council's improvement activities are compromised. That there are insufficient resources identified to deliver on the recommendations.
Officer Contact	Allison Thomas Chief Executive allison.thomas@nwleicestershire.gov.uk

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Area	Ref	Recommendations	Response & Actions	By	Change to Constitution	Timescale A 1-3 months B 3-6 months C 6-12+ months
Relationships	1	Build relations between councillors, and between councillors and officers through a programme of development workshops to build trust and openness	<p>The Chief Executive and Directors meet with the leading group fortnightly to discuss a range of topics and embryonic policy development.</p> <p>Officers have regular Portfolio Holder and shadow Portfolio Holder meetings.</p> <p>The Chief Executive meets with political groups by invitation.</p> <p>Informal workshops are held on key topics of interest (waste service, budget, housing improvement, audit).</p> <p>A comprehensive member induction is held following Council elections. Investment has been made in a member development and training programme.</p> <p>Cross party working informally and formally on key projects – i.e. waste review.</p> <p>Members views on how to address this recommendation specially will be sought through Corporate Scrutiny and Cabinet meetings. Would external support (for example from the LGA) assist with helping to address this recommendation?</p>	Chief Executive	No	Ongoing but additional items over the next 6-12 months.
Risk Management	2	Use the Risk Register and the Annual Governance Statement to raise situational awareness and future concerns	<p>The Corporate Risk Register is regularly reported to Audit and Governance Committee and to Corporate Leadership Team.</p> <p>The Annual Governance Statement (AGS) is presently drafted by the Section 151 Officer and subsequently reviewed by both the Chief Executive and the Monitoring Officer. In the future the AGS will be developed in</p>	Director Resources	No	12 months

			<p>partnership with the corporate leadership team and aligned with the Oflog best value guidance.</p> <p>The Council has been recognised as an exemplar by the LGA for its work on Governance and Assurance</p> <p>Departmental and Service Plans contain risk registers to cover their specific areas of service across the Council.</p> <p>A Corporate Risk Group has been established comprising representatives from each department to oversee the development of the corporate and service risk registers and to regularly review the Council's approach to risk management and to ensure key risks have been identified and mitigating actions put in place.</p> <p>Training for CLT and extended leadership team and members has been delivered.</p>			
Financial Management	3	Ensure that financial transactions and contracts are under consistent and robust review	<p>The Council has recently procured the services of V4 – a procurement and contracts specialist to provide additional procurement support to the Council.</p> <p>The key focus will be the finalising a new Procurement Strategy and support in maintaining robust contracts' register that is regularly reviewed by CLT to ensure the Council is compliant with its contract procedures.</p> <p>The introduction of the Procurement Act 2023 provides additional complexity to procurement activity. A task and finish group is currently reviewing the changes to systems and processes. A key element of this is the review of the Council's contract procedure rules. This work is already in train, however, V4 should be able to provide additional advice and support.</p> <p>Officers will also receive training in respect of the Procurement Act 2023.</p>	Director of Resources	Yes – change to contract procedure rules.	6 months

			<p>The S151 Officer has been working closely with the new external auditors to ensure successful transition and good progress has been made in publishing the 2021/22 and 2022/23 Statement of Accounts. In respect of the Statement of Accounts for 2023/24 the Council will not be in a position to meet the backstop date like many councils across the Country. The Council is not an outlier in this regard; however, the S151 Officer has made contact with MHCLG to inform them of this and awaits further guidance. The Council's external auditors is fully sighted on this issue and will be working closely with the Council to mitigate this position.</p> <p>Significant work has been undertaken with the Council's Internal Audit Service to ensure a comprehensive Internal Audit Plan is delivered.</p>			
Communications	4	Establish a thorough two-way Corporate Communications Engagement Plan	<p>The Corporate Communications Strategy is updated every year. This year includes a focus on developing new channels for internal communications. This includes internal comms brand "We are NWL".</p> <p>A separate Communications Strategy has been developed for the Council's transformation programme and is being rolled out. Staff roadshows took place in July and in early November across the Council including for front-line and remote workers.</p> <p>Virtual "in conversation" topic-based all-staff information and dialogue sessions are planned, the first one being in respect of governance.</p> <p>There is an expanded weekly all-staff email and there are now knowledge sharing events in place. There are also specific communications plans for certain activities and areas – e.g. Transformation and the Housing Service.</p>	Chief Executive	No	Completed

Transformation	5	Enhance the newly adopted Transformation Plan with a clear set of financial outcomes, deliverable dates, benefits, third party dependencies and risks across all programme areas	<p>A monitoring form has been established with key metrics for the delivery of each project/scheme. This is monitored by the Transformation Steering Group.</p> <p>The successful appointment of a Transformation Programme Officer, together with the LGA Graduate, will ensure that all future projects/schemes are regularly reviewed.</p> <p>Transformation performance is reported regularly to Members as part of the quarterly performance monitoring to Cabinet and Scrutiny including the monitoring of the £500k allocated for transformation work.</p> <p>Business cases for new projects and schemes are reviewed by the Council's Transformation Steering Group, with funding requests drawn from the £500k Transformation Fund.</p>	Director of Resources	No	12 months
Housing	6	Conduct a wholesale process mapping and review of systems in Housing Repairs	<p>The Council has recognised its housing service is not providing as good a service as it should be. In recognition of this Cabinet set up a Housing Improvement Board in the Spring 2024 consisting of representatives of all major political parties and is working its way through a number of topics including repairs management and has already drawn up a Housing Improvement Plan.</p> <p>Between the Peer Review and the publication of this action plan the Council has already reviewed its repairs policy. This has gained political agreement and has been actioned.</p> <p>Since the Peer Review a whole home contractor has been procured to assist with the management and delivery of the repairs service, focusing on the work in progress and delayed repairs delivery.</p> <p>At the time of the Peer Review there were significant gaps in the housing management team inhibiting the ability to deliver services. Significant work has been undertaken over the summer to recruit to key roles to enable the delivery of the service and progress improvements. A Knowledge Information Management self-assessment as set out by the Regulator for Social Housing has also been undertaken and an action plan will be developed. In addition, work around the culture issues covered in the</p>	Director Communities	No	<p>Completed</p> <p>Completed</p> <p>Completed</p> <p>Within 6/12 months</p>

			report are and continue to be addressed as part of the Improvement Plan process.			
External Stakeholders	7	Engage more proactively in partnership working in all settings, ensuring the maximum benefit for the district's businesses and residents	The Council has reinvigorated its Parish Liaison meetings, including being led by a member of the senior leadership team. The Chief Executive, Director of Resources and other members of the CLT have attended a meeting of parish clerks and have agreed to share the Council's Forward Plan in the future to ensure that key items of interest are flagged in advance.	Director of Communities	No	Completed and ongoing in terms of Forward Plan
			The Council has recently agreed a District-wide Regeneration Frameworks to sit alongside its Coalville Regeneration Framework. The Council engaged with a range of partners in its development and will work closely with key partners on its delivery over the next few years.	Director of Place	No	12 months Annual Review
			The Chief Executive will continue to have regular planned 'catch up' meetings with the two MPs covering North West Leicestershire, Trade Unions, The National Forest Company, East Midlands Airport, Health providers, the East Midlands Freeport and social housing providers.	Chief Executive	No	Ongoing
			The Chief Executive will continue to play an active role in the District Chief Executives' meeting for Leicestershire as well as the Public Sector Leaders' meeting involving the County Council, City Council, Police, Health and Government Department liaison officers.			
			The Leader will continue to attend the Leicestershire District Leaders' meeting on a quarterly basis and will be participating in a MPs Summit in December. North West Leicestershire will be chairing the Leaders' meeting in 2025/26.	Leading Members	No	Ongoing

			<p>A member of the Alliance has recently represented the Alliance administration at the annual Local Government Association Conference and plays a leading role in the Independent Group of the LGA.</p> <p>Cabinet members are also well represented on other sub regional boards such as the East Midlands Freeport.</p> <p>Members are also regular attendees at other meetings such as Parish Councils and represent the Council on other boards and forums as agreed at Annual Council.</p> <p>Members of CLT attend a range of local, regional and national forums on topic specific issues.</p> <p>The Head of HR and Organisational Development leads the Council's work with the Local Resilience Partnership</p> <p>The Council is also currently collaborating with East Midlands Councils on project to support recruitment and retention of key staff to support its emerging Workforce Strategy which will be considered by CLT in December. A Health and Wellbeing Strategy was approved for consultation earlier this year and is being finalised.</p> <p>The Council is on course for its Investor in People assessment in March 2025.</p>	CLT	No	12 months and ongoing
				Head of HR and OD	No	Ongoing
				Head of HR and OD	No	6 months

LGA Corporate Peer Challenge – Progress Review

North West Leicestershire District
Council

1-2 April 2025

Feedback



Corporate Peer Challenge

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1. Introduction

The council undertook an LGA Corporate Peer Challenge (CPC) during June 2024 and published the full report with an action plan.

The Progress Review is an integral part of the Corporate Peer Challenge process. Taking place approximately ten months after the CPC, it is designed to provide space for the council's senior leadership to:

- Receive feedback from peers on the early progress made by the council against the CPC recommendations and the council's RAG rated CPC Action Plan.
- Consider peers' reflections on any new opportunities or challenges that may have arisen since the peer team were 'on-site' including any further support needs
- Discuss any early impact or learning from the progress made to date

The LGA would like to thank North West Leicestershire District Council (NWLDC) for their commitment to sector led improvement. This Progress Review was the next step in an ongoing, open and close relationship that the council has with LGA sector support.

2. Summary of the approach

The Progress Review at North West Leicestershire District Council took place (onsite) on 2-3 April 2025.

The Progress Review focussed on each of the recommendations from the Corporate Peer Challenge, under the following theme headings:

- Governance and finance
- Communications
- Transformation
- Housing
- Looking forward

For this Progress Review, the following members of the original CPC team were

involved:

- Cllr Abi Brown OBE, Stoke-on-Trent City Council
 - Larissa Reed, Swale Borough Council
 - Paul Bellotti, East Riding of Yorkshire Council
- And Judith Hurcombe, Local Government Association

3. Progress Review - Feedback

Out of the CPC's 7 recommendations, the council's RAG rated action plan reports progress on all of those recommendations and the peer team could see evidence of that progress.

3.1. Governance and finance

Since June 2024, the council has paid close attention to raising the profile of good governance across the organisation, clearly led by the chief executive. This has included mandatory governance training for all managers and the introduction of an annual governance month, originally piloted in November 2023 but a more detailed face-to-face training programme was delivered in November 2024.

The peer team was told that the council has a good level of reserves of circa £30m. Whilst the council is projecting an overspend for 2024/25, there are contingencies in place to offset this and outturn with a balanced budget.

The Audit and Governance Committee has received intensive training, and a working group of members has focused on updating the council's arrangements for dealing with code of conduct complaints and the council's constitution. The Annual Governance Statement has been updated to reflect revisited risks ahead of the next meeting of the Audit and Governance Committee in April 2025.

Attention is also being given to developing the member development programme and will include guidance on the member-officer protocol and a refresher on the councillors' code of conduct. A Debate Not Hate working group has also been formed.

The council has taken steps to ensure its financial transactions and contracts are

more robust. This includes updating NWLDC's contract procedure rules, which were agreed at Full Council in February 2025. The corporate risk register has been revised to make it easier for stakeholders to understand the risks and mitigations, and membership of the corporate risk group has been reviewed. Procurement training for officers to reflect compliance with the Procurement Act 2023 is underway.

There is widespread concern about the ongoing implementation of the council's finance system. Difficulties were mentioned about reconciling budgets effectively across departments, however, the peer team was told that the director is managing the contract well and holding regular progress meetings with the supplier. Staff told us they welcomed the director's clarity and honesty about frustrations with the system: there is positivity that its functionality will improve.

Over the past two financial years, the audit opinion has resulted in limited assurance. However, active measures are being taken to address the issues identified. An internal audit action plan is being actively implemented, with monthly reporting to the Corporate Leadership Team (CLT). CLT is self-aware of these governance issues and gave the peer team the sense that the council is on top of things and motivated to improving controls even further across finance, procurement, capital investment, housing and fleet management.

Work is ongoing to support the new external auditors, including on the 2023/24 statement of accounts. However, in common with some other councils, NWLDC did not meet the backstop dates for the publication of the accounts for 2023/24.

The East Midlands Freeport Board has now been constituted. Active contributions are being made by NWLDC's officers to a variety of sub-groups, including for transport, sites and infrastructure; an operational forum; for the Freeport's vision; and for the S.151 sub-committee.

3.2. Communications

Much attention has been paid to communications over the past few months across a variety of mechanisms including live streamed events via Teams; the first knowledge exchange in December 2024 which focused on a day in the life of the customer services team; and an ideas pathway which encourages staff to submit proposals to

be considered by CLT. Efforts have been made to improve dialogue so that staff feel they not only receive information but can also channel views upwards. This was widely welcomed by the workforce, along with the ongoing opportunities to give their views. Staff roadshows led by the chief executive and with directors attending have taken place and have been welcomed by attendees, with 98% attending stating that they felt communication and engagement has improved. Further work is planned for front line staff including events focusing on men's health for those working in the depots.

3.3. Transformation

The transformation programme appears to be well thought out and well-led, supported by a budget of £500,000 for new initiatives. It is supported by new key appointments who bring energy, robust monitoring and a cohesive strategic view across the array of projects in the delivery plan, as well as bringing in good practice and reflection from external networks and other councils. The council has committed to undertake the LGA's transformation and innovation exchange self-assessment. It will be important to ensure that the responsibility and accountability for delivering transformation is widely owned across the organisation, utilising the support and expertise available, rather than expecting the small transformation team to achieve it on behalf of services.

The council is also exploring how it can utilise artificial intelligence (AI) to improve service effectiveness, delivery and outcomes for residents. A proof-of-concept project using Microsoft CoPilot is underway with plans to roll out training and then conduct the trial during spring and summer of 2025. In addition, an AI officer group has been created to exchange ideas and understanding of how it is already being used and to explore its potential across the organisation.

3.4. Housing

The council is working with the Social Housing Regulator to address the levels of complaints and other historic issues identified in its housing repair service.

There are good signs of improvement in housing despite continuing difficulties recruiting and retaining housing staff including gaining a better understanding of the

repairs and maintenance backlog and the accuracy of the 7,000 items logged, including addressing duplication and incomplete records. The council's appointed external contractor is working on addressing long standing repairs. Members of staff are clearly ambitious to get repairs undertaken at the right time, to a good standard of quality and to achieve residents' satisfaction. They are clearly keen to have the repairs function wholly back in-house whilst recognising the necessity for additional external help at this time.

Damp and mould works have been undertaken by reallocating staff from other within the housing service. Going forward the council plans to establish a full team to ensure it is meeting new legislative requirements that come into force later this year. The peer team was told that the number of properties requiring remedial attention was initially around 10 percent of the council's housing stock. Although more cases are being reported, the backlog is being cleared and training for operatives has helped improve the quality of remedial works.


The peer team is satisfied that progress is being made across the wide range of the recommendations arising from the CPC in June 2024.

3.5. Looking forward

The government's devolution and local government reorganisation (LGR) intentions announced in December 2024 will challenge all councils affected, including NWLDC. The council's executive is continuing to show signs of stability in their alliance across two political groups and two independent councillors in leading the council's business. The chief executive is working closely with other councils on the LGR developments in North West Leicestershire. Staff told us they particularly value the reassurance she is providing, and they feel the information about LGR is communicated well and with honesty about the future.

As there will not be a further revisit on this CPC, there are a few issues which the council needs to think about for the short and medium term:

- Progress is being made in housing repairs, but there are some staff capacity issues which could hinder delivery. The peer team was told about the age and reliability of some of the council's fleet vehicles which could jeopardise the



achievement of targets and ultimately tenants' satisfaction, as well as sometimes incorrect allocation of jobs to multi-skilled operatives. The council is currently assessing the operational effectiveness of electric vehicles prior to making any major investment decisions on its future fleet, and is starting work on remodelling the first point of contact and management of repairs. Ongoing attention needs to be given to both the performance management of the external housing contractor and its directorate communications with staff and tenants.

- A consistent approach to staff engagement from directors and heads of service should be considered to ensure that staff feel they are supported and there is a clear flow of information throughout the organisation.
- The approach to transformation is good but the wider organisation needs to ensure it plays its role in delivering, led by directors. Impact will be aided by more ownership, benchmarked initiatives and the ongoing strong focus on customer experience and outcomes.
- More clarity would be welcomed from councillors about their vision and ambition for the new councils in Leicestershire and what they want for the residents and stakeholders of the district taking into account the opportunities and its financial constraints, and the potential for a legacy given by the council to the new organisation, including its assets.
- The approach to LGR has been mature and collegiate from members and officers. Over time the new council arrangements will emerge, and everyone will be dealing with a period of uncertainty as the council balances its stewardship role for the existing organisation as well as preparing for the future. Capacity will be stretched further and in different ways as the details of the new councils evolve. It will be important to continue to share information with staff and keep an eye on personal and service resilience through this period of change and uncertainty, and to maintain the highest standards of behaviour and integrity from members and officers, so that there are minimal distractions for everyone involved. Further engagement with staff, members, partners and stakeholders is

planned over the summer to inform the final proposals to be submitted in November.

4. Final thoughts and next steps

The LGA would like to thank North West Leicestershire District Council for undertaking an LGA CPC Progress Review.

We appreciate that senior managerial and political leadership will want to reflect on these findings and suggestions in order to determine how the organisation wishes to take things forward.

Under the umbrella of LGA sector-led improvement, there is an on-going offer of support to councils. The LGA is well placed to provide additional support, advice and guidance on a number of the areas identified for development and improvement and we would be happy to discuss this.

Mark Edgell (Principal Adviser) is the main point of contact between the authority and the Local Government Association (LGA), and their e-mail address is mark.edgell@local.gov.uk

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NORTH WEST LEICESTERSHIRE DISTRICT COUNCIL

CORPORATE SCRUTINY COMMITTEE – THURSDAY, 19 JUNE 2025



Title of Report		SCRUTINY ANNUAL REPORT
Presented by	Andy Barton Strategic Director of Communities	
Background Papers	Agendas and minutes of meetings of the Scrutiny Committees are available on the website .	Public Report: Yes
Financial Implications	None identified.	
	Signed off by the Section 151 Officer: Yes	
Legal Implications	None identified.	
	Signed off by the Monitoring Officer: Yes	
Staffing and Corporate Implications	None identified.	
	Signed off by the Head of Paid Service: Yes	
Purpose of Report	To consider and make comment on the annual report in order that it is presented to Council setting out the work of the Scrutiny Committees over the preceding 12-month period.	
Recommendations	THAT CORPORATE SCRUTINY COMMITTEE: A) PROVIDES COMMENTS ON THE ANNUAL REPORT AHEAD OF ITS SUBMISSION TO COUNCIL. B) DELEGATES AUTHORITY TO THE SCRUTINY COMMITTEE CHAIRS TO MAKE ANY FINAL AMENDMENTS TO THE REPORT FOLLOWING CONSIDERATION BY BOTH SCRUTINY COMMITTEES PRIOR TO CONSIDERATION BY COUNCIL.	

1.0 BACKGROUND

- 1.1 In accordance with the agreed scrutiny process, an annual report is submitted to Council which sets out the work of both the Scrutiny Committees over the preceding 12-month period.

- 1.2 Both Scrutiny Chairs have considered the draft report as part of the drafting process and their comments along with a foreword have been included. The draft report is being considered by this Committee and the Community Scrutiny Committee before it is reported to Council in September.
- 1.3 The Scrutiny Annual Report for 2024/25 is attached at appendix 1.

Policies and other considerations, as appropriate	
Council Priorities:	All
Policy Considerations:	None identified but regard had to this during the scrutiny process.
Safeguarding:	None identified but regard had to this during the scrutiny process.
Equalities/Diversity:	None identified but regard had to this during the scrutiny process.
Customer Impact:	None identified but regard had to this during the scrutiny process.
Economic and Social Impact:	None identified but regard had to this during the scrutiny process.
Environment, Climate Change and zero carbon:	None identified but regard had to this during the scrutiny process.
Consultation/Community Engagement:	Chairs of both Corporate Scrutiny Committee and Community Scrutiny Committee.
Risks:	None identified but regard had to this during the scrutiny process.
Officer Contact	Andy Barton Strategic Director of Communities andy.barton@nwleicestershire.gov.uk



North West Leicestershire District Council

Scrutiny Annual Report 2024/25

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Foreword

This report provides a summary of work done by scrutiny at North West Leicestershire District Council (NWLDC) during 2024/25 and provides an opportunity to reflect on this work. It also provides a general overview of how scrutiny operates, the impact it has and how the public can get involved.

The principal purpose and power of a scrutiny committee is to influence the policies and decisions made by the Council and to improve its service to the public. Each scrutiny committee gathers evidence on issues affecting local people and makes recommendations based on its findings. It reviews what the council has actually done and compares this to its stated objectives.

NWLDC operates two scrutiny committees. One looks inwards to examine the council's corporate objectives including its budget and its performance compared to its Council Delivery Plan.

Another committee focuses on issues that impact on the wellbeing of the community. This committee examines issues such as the performance of our leisure centres, the management of waste services, the provision of social housing, the enforcement of planning regulations, community safety and air quality.

There is also an overarching Scrutiny Working Group which takes an initial look at relevant issues, works with senior officers to decide what needs to be prioritised and ensures members are properly informed at the meeting.

The scrutiny committees are politically balanced so that they can include as many viewpoints as possible. This year both committees have been chaired by members of the opposition acting as critical friends to the ruling Cabinet.

In the last year we have worked hard to make sure that all the council's plans and policies are clear and realistic. Where we have had concerns, we have made recommendations to Cabinet so that performance can be improved in the future. This document is a record of our progress.



Cllr Terri Eynon
Chair of Community Scrutiny
Committee



Cllr Simon Lambeth
Chair of Corporate Scrutiny
Committee

What is scrutiny?

"The role that overview and scrutiny can play in holding an authority's decision-makers to account makes it fundamentally important to the successful functioning of local democracy. Effective scrutiny helps secure the efficient delivery of public services and drives improvements within the authority itself. Conversely, poor scrutiny can be indicative of wider governance, leadership, and service failure."

Overview and Scrutiny: Statutory guidance for council's and combines authorities – by the Department of Levelling Up, Housing and Communities (DLUHC) published 2019

Scrutiny is an important part of the council's decision-making process and allows members who are not Cabinet members to look into areas of local concern and critically examine decisions taken by the Cabinet to benefit local people.

Scrutiny committees cannot make decisions but can make recommendations to Cabinet and other decision-making bodies of the council. Scrutiny can also look at services provided by other organisations and as such can invite them into committee meetings for discussions.

Principles of good scrutiny

The Centre for Governance and Scrutiny established four key principles of scrutiny, these are:

- 1 Provides critical friend challenge to executive policy and decision makers**
Constructive, robust and purposeful challenge.
Non-aggressive to create optimum conditions for investigative evidence based process.
- 2 Enable the voice and concerns of the public**
Meetings conducted in public and are webcast.
Innovative, public communication, consultation and feedback.
- 3 Be carried out by independent minded councillors**
Councillors actively engage in scrutiny function to drive improvement.
Areas are reviewed in an a-political atmosphere.
- 4 Drive improvement in public services**
Promotes community well-being and improves quality of life.
Strategic review of corporate policies, plans performance and budgets.

Why scrutiny is important....

Scrutiny is a strategic function of the authority and is a central part corporate governance. It is therefore an important element in decision-making. It also provides councillors that are not in decision-making roles an opportunity to be a 'critical friend' to the Cabinet and publicly hold them to account in relation to the decisions they are making.

The scrutiny role...

The main tasks of the committees are:

- **Performance monitoring** – The council has to meet corporate priorities set out in the Council Delivery Plan and report against those indicators. Scrutiny can examine any aspect of the council's performance, including services that it delivers through partnerships with other organisations.
- **Holding the Cabinet to account** - Decisions made by the Cabinet but not yet put into practice can be reviewed by the Scrutiny Committees and challenged.
- **Policy review and development** - Scrutiny can propose new policies or review existing policies and recommend changes to the Cabinet.
- **External scrutiny** - Any issue directly affecting the residents of North West Leicestershire can be scrutinised by the committees, including services provided by another organisation.

It is through demonstrating the value and impact that effective scrutiny can have in supporting councils and other organisations to deliver better, more cost-effective services, that scrutiny is a valued element of local democracy.

What scrutiny looks like in North West Leicestershire

The scrutiny work is carried out by the two committees – the Corporate Scrutiny Committee and the Community Scrutiny Committee, with an informal Scrutiny Work Programming Group programming the work. Below is a list of areas of responsibility for each scrutiny committee. Each committee can receive reports and comment on matters of policy or items of business of a similar nature to those listed.

Corporate Scrutiny Committee

Asset management
Estates and property
Review of Constitution
Communications
Customer services
Finance
Human resources
Equalities
ICT
Legal services
Revenue and benefits
Shared services

Community Scrutiny Committee

Business / economy
Planning and building control
Tourism
Partnerships
Community safety
Leisure
Health and wellbeing
Waste services
Stronger and safer communities
Environmental health
Licensing
Environmental protection
Statutory crime and disorder committee
Strategic housing – housing strategy
Housing management
Economic development
Regeneration

The scrutiny committees can set up special working parties called task and finish groups when they need to undertake a detailed, in-depth investigation into a particular issue. The work is done by a small group of councillors appointed from the membership of the scrutiny committee. Work takes place for a set period and it is time limited. These focused task and finish groups make recommendations to the parent scrutiny committee before being considered by the Cabinet.

Further information can be found on NWLDC website regarding the scrutiny committee structure and terms of reference at [Part 3, section D of the council's Constitution](#).

Public involvement in scrutiny...

As the scrutiny committees are actively working on matters that affect the residents of North West Leicestershire, involvement of the public is encouraged in the following ways:

- Accessing agendas/work programmes: All work either planned or already done by the scrutiny committees is publicly available on the NWLDC website (unless in relation to a confidential matter). All meeting dates and corresponding information can be found [on the NWLDC website](#).
- Attending meetings: Members of the public can attend any public meeting of the scrutiny committees. Details of meeting dates can be found on [the NWLDC website](#). If you are interested but are unable to attend in person, the meetings are also available to view online both live and after the event. Links to meetings can be found [on the NWLDC website](#).
- Asking a question: Each meeting of the scrutiny committees allows for public questions to be asked at the beginning of each agenda. Information on how to submit a question can be found here [on the NWLDC website](#)
- Submitting a petition: Scrutiny Committees can receive petitions relating to an area that the council has authority over. It can be submitted by anyone who lives, works or studies in North West Leicestershire and can be submitted in writing or as an e-petition on the NWLDC website. Further details can be found [on the NWLDC website](#).
- Identifying issues which a scrutiny committee might look at (via officers or committee members)
- Contributing to consultations and surveys

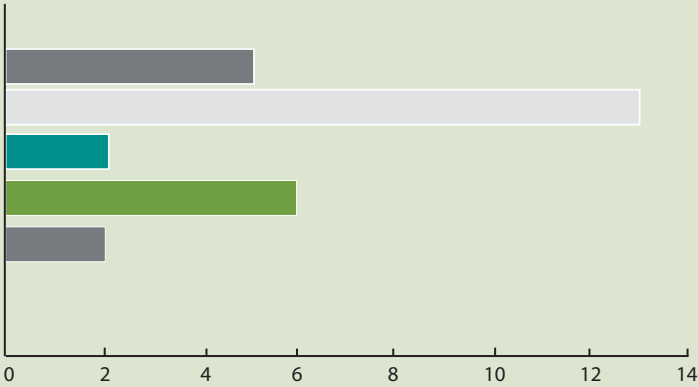
What has scrutiny been doing?

Each scrutiny committee is made up of 10 members, four of which sit on both Corporate and Community Scrutiny Committees. In total there are 16 members out of the 38 elected to represent the district who take part in scrutiny.



Reports received into scrutiny: 28

- For information and update: 5
- Pre-Cabinet review: 13
- Policy reviews: 2
- Performance reviews: 6
- Scrutiny process: 2
- Task and finish group recommendations: 0



Committee meetings held	9
Corporate Scrutiny Committee	5
Community Scrutiny Committee	4
Hours of pubic debate	14hrs 36mins
Recommendations submitted to Cabinet	5
Recommendations were accepted by Cabinet	5

Scrutiny Work Programming Group

The Scrutiny Work Programming Group is an informal group, made up of councillors and officers, that has been in operation since early 2022 and was established to manage the growing workloads of both committees and to help shape the scrutiny function moving forward. The group's key role is to:

- Consider requests for inclusion on the work programmes of each scrutiny committee
- Consider whether there are other ways of receiving information
- Consult with members of scrutiny committees, senior officers, Cabinet members for horizon-scanning on policy development
- Look at the corporate priorities, Council Delivery Plan and Cabinet forward plan and identify key issues / topics for investigation / inquiry
- Consider events and decisions in the council's calendar which could require an input / consultation via scrutiny
- Review any follow-up work required after previous scrutiny

Due to the cross overs with scrutiny, the Chair of the Audit and Governance Committee along with the lead officer attend each of the Scrutiny Work Programming Group meetings to discuss closely linked matters.

Work programming

The group reviews the work programmes for both scrutiny committees at each meeting, ensuring that workloads are appropriate and identifying future items from the Cabinet's Executive Decision Notice.

Work requests

The group considers any requests for items received from members and if it is felt that value would be added by scrutinising, they determine the best route to take, whether that be a task and finish group, report to committee or information paper. In 2024/25 the group considered nine work requests which resulted in:

- One report
- Two requests were incorporated within already scheduled reports
- Two information papers were provided
- Two ongoing requests for further scoping/ consideration during the civic year 2025/26
- Approval of the formation of a Task and Finish Group to carry out work during the civic year 2025/26.

Information papers

'Information papers' are for the Work Programming Group to consider, rather than full reports to the committees, when this approach is deemed appropriate.

In 2024/25, the group received two information papers:

- Air Quality and Zero Carbon
Outcome: no further report was required for Committee; the paper was shared with the Portfolio Holder for Communities and Climate Change.
- Improving Customer Contact Project
Outcome: agreed that the Communications Team Manager would bring an update to the Scrutiny Work Programming Group at the midpoint of the project for further scoping.

Annual report

The group were involved in shaping the Annual Scrutiny Report prior to consideration by both scrutiny committees and Council.

Membership	Attendance				
	17 Jul 24	2 Oct 24	11 Dec 24	5 Mar 25	%
Lee Windram	N	N	N	N	0%
Terri Eynon (Chair of Community SC)	Y	Y	Y	Y	100%
Simon Lambeth (Chair of Corporate SC)	Y	Y	Y	N	75%
Paul Lees	Y	Y	Y	Y	100%

Corporate Scrutiny Committee

Set out below are the key topics the Corporate Scrutiny Committee has scrutinised in 2024/25. All agendas and full details of the committee's work can be found on the [NWLDC website](#).

Council's budget setting

The committee thoroughly examined the draft budgets for 2024/25 as part of the budget consultation process and it was acknowledged that the council was facing a range of financial pressures and challenges. The committee:

- Requested a range of clarifications and further information outside of the meeting on specific lines and proposals contained within the draft budget.
- Noted the potential challenges associated with agency staffing, post deletions, pay awards, and the projected medium term budget shortfall.
- Welcomed the proposed plans to work with a 'registered provider' to mitigate problems associated with homelessness within the district, as contained within the 2025/26 Housing Revenue Account (HRA) Budget.

Local Government Association (LGA) Peer Review

The committee scrutinised the feedback from the June 2024 LGA Peer Review visit and considered the post-review Action Plan which had been drafted by the Chief Executive, before this was presented to the Cabinet in December 2024.

The committee:

- Commended the positive findings and welcomed the wide basis of consultation.
- Probed both the value and the limitations of the peer review method.
- Discussed engagement with local businesses and communications with staff members and residents.

Performance monitoring

One of the roles of scrutiny is to examine and monitor the council's performance by using the priorities as set out in the Council Delivery Plan.

The Corporate Scrutiny Committee looks at the overall performance and the financial performance on a quarterly basis.

The financial performance continued to be reviewed on a quarterly basis and comments fed back to the Corporate Portfolio Holder.

The committee:

- Submitted its views on the quarterly financial performance updates
- Expressed concern at the rise in customer complaints
- Questioned staffing plans and budgets and requested a report for more information
- Questioned the performance reporting process.

Council tax discounts and exemptions

The committee scrutinised proposed changes to council tax discounts and exemptions regarding empty homes in December 2024, ahead of the approval of a new policy by Cabinet in January 2025. All formal recommendations were accepted by the Cabinet.

The committee:

- Recommended to Cabinet that second homeowners pay a 100% surcharge on their Council Tax from day one.
- Recommended that the six-month 50% Council Tax discount for major repairs and charge full council tax from the point of ownership be removed.
- Recommended to the Cabinet that the proposed removal of the one month 100% council tax discount for empty, unoccupied and unfurnished properties be rejected.
- Recommended that the Council charge Properties Empty for one to five years, twice standard council tax (200%); those Empty five-10 years three times the standard council tax (300%); and those Empty 10 years or more four times the standard council tax (400%).

Task and finish groups

The Committee established no Task and Finish Groups in 2024/25.

Committee meetings held	5
Reports considered	18
Recommendations submitted to Cabinet	5
Recommendations accepted by Cabinet	5
Comments submitted to Cabinet	0
Hours of public debate	8 hrs 26 mins
Questions submitted by public	0

Membership	Attendance					
	23 May 24	29 Aug 24	5 Dec 24	7 Jan 24	13 Mar 25	%
Simon Lambeth (Chair)	Y	Y	Y	Y	Y	100%
Mike Ball (Deputy Chair)	Y	Y	Y	Y	Y	100%
Catherine Beck	Y	Y	Y	Y	Y	100%
Murrae Blair-Park	Y	N	Y	Y	Y	80%
Morgan Buke	Y	Y	Y	Y	Y	100%
Kenny Horn	N	N	Y	Y	N	40%
Alison Morley	Y	Y	Y	Y	N	80%
Ray Morris	Y	Y	Y	Y	N	80%
Sean Sheahan	Y	Y	Y	Y	Y	100%
Jake Windram	Y	Y	Y	Y	Y	100%

Community Scrutiny Committee

Set out below are the key topics the committee has scrutinised in 2024/25. All agendas and full details of the committee's agendas can be found [on the NWLDC website](#).

Future of Waste Services

As part of the consultation process for the proposed changes to waste services, a meeting of the Community Scrutiny Committee was held on Thursday, 27 March 2025 to scrutinise the proposals in depth, ahead of their approval by the Cabinet on Tuesday 22 April 2025.

The Committee:

- Scrutinised how staffing arrangements would change due to the proposed changes to the services.
- Scrutinised the possible impacts which the proposed local government reorganisation would have on the proposed changes.
- Welcomed the synergy between the Committee, Officers and the Portfolio Holder for Communities and Climate Change on how to proceed.

Tree Management Strategy

The committee was asked to review the draft Tree Management Strategy on 6 February 2025, ahead of its presentation to the Cabinet on 25 March.

The committee:

- In the course of discussion suggested several tweaks to certain policies within the strategy, which were taken up by officers when the final iteration of the report was presented to the Cabinet.
- Requested a Housing Revenue Account Tree Management Strategy be presented to the Committee, once the required survey work had been carried out, to complement the work before them which primarily focused on the Tree Management Strategy within the General Fund Budget.
- Asked about the synergy between the Tree Management Strategy, the Local Plan, and the work of the Planning Enforcement Team.

District-Wide Regeneration Framework

The District-Wide Regeneration Framework was considered by the committee on 19 September 2024, ahead of its approval by the Cabinet on 22 October 2024.

The committee:

- Suggested that the document needed a clearer project pipeline and stronger governance structures, though they accepted they had been presented with only the iteration.
- Considered how the document fitted with other strategic considerations regarding the provision of infrastructure, such as the Local Plan process and the ongoing campaign to reopen the Ivanhoe Line.
- Requested that an annual report be presented to the Committee each year to scrutinise the ongoing progress of the District-Wide Regeneration Framework.

Health and wellbeing

The health and wellbeing of the community is an important matter for the committee and several reports have been received in 2024/25 for consideration.

The committee:

- Reviewed an update report on air quality and requested that the Scrutiny Work Programming Group further scope the links between air quality and the council's Zero Carbon targets.
- Received an update on the effectiveness of council leisure centres which was broadly welcomed and commended as a thorough report which detailed demonstrable success.

Task and finish groups

The committee established no Task and Finish Groups in 2024/25.

Committee meetings held	4
Reports considered	10
Recommendations submitted to Cabinet	0
Recommendations accepted by Cabinet	0
Comments submitted to Cabinet	0
Hours of public debate	6 hrs 12 mins
Questions submitted by public	0

Membership	Attendance				
	27 Jun 24	19 Sep 24	6 Feb 25	27 Mar 25	%
Dr Terri Eynon (Chair)	Y	Y	Y	Y	100%
Murrae Blair-Park (Deputy Chair)	Y	N	N	Y	50%
Mike Ball	Y	Y	Y	N	75%
Dave Bigby	N	Y	Y	N	50%
Marie French	Y	N	Y	Y	75%
Kenny Horn	N	Y	Y	N	50%
Simon Lambeth	Y	Y	Y	Y	100%
Paul Lees	Y	Y	N	Y	75%
Elizabeth Parle	Y	Y	Y	Y	100%
Lee Windram	Y	Y	Y	Y	100%

Where to get more information

If you would like more information about how to get involved or suggest a topic for scrutiny review, you can contact the Democratic Services Team on 01530 454512 or memberservices@nwleicestershire.gov.uk. You can also contact the Scrutiny Committee Chairs directly:

Councillor Simon Lambeth

Chair of the Corporate Scrutiny Committee

simon.lambeth@nwleicestershire.gov.uk

Councillor Terri Eynon

Chair of Community Scrutiny Committee

terri.eynon@nwleicestershire.gov.uk

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Corporate Scrutiny Committee – WORK PROGRAMME (as at 11/06/25)

Date of Meeting	Item	Lead Officer	Witnesses	Agenda Item Duration
September 2025				
4 September 2025	Environmental Policy To review newly proposed environmental policies.	Paul Sanders, Head of Community Services	-	30 minutes
4 September 2025	Workforce Strategy To consider new medium and long-term policies relating to the Council's workforce, i.e., recruitment, retention, the use of apprenticeship schemes and aims to reduce the use of agency staff, ahead of the new strategy being presented to the Cabinet.	Hannah Panter, Head of HR and Organisational Development	-	30 minutes
4 September 2025	Quarterly Performance Monitoring Report To report on the Council's performance during the previous quarter, measured against the indicators as set out in the Council Delivery Plan 2023-2028.	Hannah Panter, Head of HR and Organisational Development	-	30 minutes
4 September 2025	Quarterly General Fund and Housing Revenue Account Update For Members to note and comment on the performance of the General Fund and Housing Revenue Account (HRA) budgets, during the previous quarter.	Anna Crouch, Head of Finance	-	30 minutes
November 2025				
20 November 2025	Local Government Reorganisation	Allison Thomas, Chief Executive	-	60 minutes

Date of Meeting	Item	Lead Officer	Witnesses	Agenda Item Duration
December 2025				
4 December 2025	Quarterly Performance Monitoring Report To report on the Council's performance during the previous quarter, measured against the indicators as set out in the Council Delivery Plan 2023-2028.	Hannah Panter, Head of HR and Organisational Development	-	30 minutes
4 December 2025	Quarterly General Fund and Housing Revenue Account Update For Members to note and comment on the performance of the General Fund and Housing Revenue Account (HRA) budgets, during the previous quarter.	Anna Crouch, Head of Finance	-	30 minutes
January 2026				
8 January 2026	Draft Budget 2026/27 The Committee are invited to make comment on the 2026/27 draft budget proposals as part of the consultation process.	Anna Crouch, Head of Finance	-	60 minutes
March 2026				
19 March 2026	Housing Repairs Update This report will set out housing repairs performance and highlight the issues impeding delivery of an efficient and good housing service to Council tenants.	Andy Barton, Strategic Director of Communities	-	30 minutes
19 March 2026	Quarterly Performance Monitoring Report To report on the Council's performance during the previous quarter, measured against the indicators as set out in the Council Delivery Plan 2023-2028.	Hannah Panter, Head of HR and Organisational Development	-	30 minutes

Date of Meeting	Item	Lead Officer	Witnesses	Agenda Item Duration
19 March 2026	Quarterly General Fund and Housing Revenue Account Update For Members to note and comment on the performance of the General Fund and Housing Revenue Account (HRA) budgets, during the previous quarter.	Anna Crouch, Head of Finance	-	30 minutes

Work requests considered by the Scrutiny Work Programming Group

No current work requests

Principles and Criteria used for Assessing Items Put Forward

Identify Issues for consideration by Scrutiny

- Consulting with members of Scrutiny Committees, senior officers, Cabinet members – horizon scanning on policy development
- Looking at the corporate priorities, Council Delivery Plan and Cabinet Forward plan – identify key issues/topics for investigation/inquiry
- Considering events and decisions in the Council's calendar which could require an input/consultation via scrutiny – eg budget setting, CDP development
- Considering requests from members – eg via another forum or scoping report submitted
- Evaluating the Council's performance – eg quarterly reports, end of year reports, reviewing success of a particular scheme or initiative
- Reviewing any follow up work required after previous scrutiny work

Prioritise the potential list of scrutiny topics based on factors including

- the resources required to deliver it (from members, offices and financially)
- the value and level of impact which could be achieved
- link to the council's priorities
- whether it is a regular recurring item which requires consideration before Cabinet/Council approval
- consideration of the guidance for selecting scrutiny topics

Topics are suitable for Scrutiny when	Topics are not suitable for Scrutiny when
Scrutiny could have an impact and add value	The issue is already being addressed elsewhere and change is imminent
The topic is of high local importance and reflects the concerns of local people	The topic would be better addressed elsewhere (and will be referred there)
The resources are available that would be required to conduct the review – staff and budget	Scrutiny involvement would have limited or no impact on outcomes
It avoids duplication of work elsewhere	The topic would be sub-judice or prejudicial to the councils interests
The issues is one that the committee can realistically influence	The topic is too broad to make a review realistic
The issue is related to an area where the council or one of its partners is not performing well	New legislation or guidance relating to the topic is expected in the next year

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PREVIOUS SCRUTINY RECOMMENDATIONS TO CABINET

No recommendations were made.

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DRAFT Notice of Executive Key Decisions

The attached notice lists the matters which are likely to be the subject of a key decision by the Council's executive and executive decision making bodies. This notice is produced in accordance with the Constitution adopted by North West Leicestershire District Council and will be published a minimum of 28 days before the date on which a key decision is to be made on behalf of the Council.

The date of publication of this notice is Friday, 27 June 2025. The Deadline for making any representations as to why items marked as private should be considered in public by **Cabinet on 29 July 2025 is 5pm Friday, 18 July 2025.**


Key Decisions

A key decision means a decision taken by the Cabinet, a committee of the Cabinet, an area or joint committee or an individual in connection with the discharge of a function which is the responsibility of the executive and which is likely:

- (a) to result in the Council incurring expenditure which is, or the making of savings which are, significant having regard to the Council's budget for the service or function to which the decision relates; or
- (b) to be significant in terms of its effects on communities living or working in an area comprising two or more wards in the area of the Council;
- (c) for the purposes of (a) and (b) above £100,000 shall be regarded as significant in terms of expenditure or savings, and any issue which, in the opinion of the Leader is likely to have an impact on people, shall be regarded as significant in terms of impact on communities.

The Council's Executive

The Council's executive committee is the Cabinet. The Cabinet comprises:

 Councillor R Blunt	-	Leader
Councillor M Wyatt	-	Deputy Leader and Communities & Climate Change
Councillor T Gillard	-	Business and Regeneration
Councillor K Merrie MBE	-	Finance & Corporate
Councillor N J Rushton	-	Infrastructure
Councillor A Saffell	-	Planning
Councillor A Woodman	-	Housing, Property & Customer Services

Confidential Items and Private Meetings of the Executive

Whilst the majority of the Cabinet's business at the meetings listed in this notice will be open to the public and media organisations to attend, there will inevitably be some business to be considered that contains, for example, confidential, commercially sensitive or personal information. This is a formal notice under the Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012 that part of the Cabinet meetings listed in this Forward Plan may be held in private because the agenda and reports for the meeting contain exempt information under Part 1 Schedule 12A to the Local Government Act (Access to Information) Act 1985 (as amended) and that the public interest in withholding the information outweighs the public interest in disclosing it. Those Items where it is considered that they should be considered in private are identified on the Notice.

Access to Agenda and Related Documents

Documents relating to the matters listed in this notice are available at least 5 clear working days prior to the date of decision as indicated below. Other documents relevant to the matters listed in this notice may be submitted to the decision maker.

If you wish to request or submit a document, or make representation in relation to any issue contained within this notice, please contact Democratic Services on telephone number 01530 454512 or by emailing memberservices@nwleicestershire.gov.uk

Executive Decisions

Decision	Decision Maker	Status of Decision	Public or Private (and reason – where private)	Date of Decision	Contacts	Documents to be submitted to the Decision Maker	Considered by Scrutiny or other Committee
June 2025							
Peer Review Feedback Follow Up	Cabinet	Key	Public	24 June 2025	<p>Councillor Richard Blunt Tel: 01530 454510 richard.blunt@nwleicester-shire.gov.uk</p> <p>Chief Executive Tel: 01530 454500 allison.thomas@nwleicester-shire.gov.uk</p>	Peer Review Feedback Follow Up	Corporate Scrutiny 19 June
Treasury Management Stewardship Report 2024/25	Cabinet	Non-Key	Public	24 June 2025	<p>Councillor Keith Merrie MBE Tel: 07596 112270 keith.merrie@nwleicester-shire.gov.uk</p> <p>Head of Finance Tel: 01530 454492 anna.crouch@nwleicester-shire.gov.uk</p>	Treasury Management Stewardship Report 2024/25	Audit & Governance Committee, 4 June 2025
Annual Corporate Complaints	Cabinet	Key	Public	24 June 2025	<p>Councillor Andrew Woodman Tel: 07970 520357 andrew.woodman@nwleicestershire.gov.uk</p> <p>Customer Services Team Manager nichola.oliver@nwleicestershire.gov.uk</p>	Annual Corporate Complaints	Corporate Scrutiny Committee, 19 June 2025.

Decision	Decision Maker	Status of Decision	Public or Private (and reason – where private)	Date of Decision	Contacts	Documents to be submitted to the Decision Maker	Considered by Scrutiny or other Committee
Review of Transformation Delivery Plan	Cabinet	Non-Key	Public	24 June 2025	Councillor Andrew Woodman Tel: 07970 520357 andrew.woodman@nwleicester.gov.uk Transformation Programme Officer jessica.lloyd-davies@nwleicester.gov.uk	Actual Transformational Delivery Plan as appendix Transformation Delivery Plan report Review of Transformation Delivery Plan	Being considered by Corporate Scrutiny
Supplementary Estimates, Virements and Capital Approvals 205	Cabinet	Key	Public	24 June 2025	Councillor Keith Merrie MBE Tel: 07596 112270 keith.merrie@nwleicester.gov.uk Head of Finance Tel: 01530 454492 anna.crouch@nwleicester.gov.uk	Supplementary Estimates, Virements and Capital Approvals	Delegated Cabinet function
Delegation of approval of employee related policies	Cabinet	Non-Key	Public	24 June 2025	Councillor Nicholas Rushton Tel: 01530 412059 nicholas.rushton@nwleicester.gov.uk Head of Human Resources and Organisation Development hannah.panter@nwleicester.gov.uk	Report Delegation of approval of employee related policies	This is a cabinet function

Decision	Decision Maker	Status of Decision	Public or Private (and reason – where private)	Date of Decision	Contacts	Documents to be submitted to the Decision Maker	Considered by Scrutiny or other Committee
Award of Contracts	Cabinet	Key	Private Information relating to the financial or business affairs of any particular person (including the authority holding that information)	24 June 2025	Councillor Keith Merrie MBE Tel: 07596 112270 keith.merrie@nwleicester-shire.gov.uk Strategic Director of Communities Tel: 01530 454819 andy.barton@nwleicester-shire.gov.uk	Award of Contracts	N/A - delegated Cabinet function
Acquisitions and Disposals 206	Cabinet	Key	Private Information relating to the financial or business affairs of any particular person (including the authority holding that information)	24 June 2025	Councillor Andrew Woodman Tel: 07970 520357 andrew.woodman@nwleicestershire.gov.uk Strategic Director of Communities Tel: 01530 454819 andy.barton@nwleicester-shire.gov.uk	Acquisitions and Disposals	N/A - delegated Cabinet function
July 2025							
Marlborough Centre and Changing Places	Cabinet	Key	Public	29 July 2025	Councillor Tony Gillard Tel: 01530 452930 tony.gillard@nwleicestershire.gov.uk Senior Economic Development Officer Tel: 01530 454678 emily.marquez@nwleicestershire.gov.uk	Marlborough Centre and Changing Places	Delegated Cabinet function

Decision	Decision Maker	Status of Decision	Public or Private (and reason – where private)	Date of Decision	Contacts	Documents to be submitted to the Decision Maker	Considered by Scrutiny or other Committee
Former Tenant Rent Arrears, Current Tenant Rent Arrears, Council Tax, Non-Domestic Rates and Sundry Debts Write Offs	Cabinet	Key	Public	29 July 2025	Councillor Keith Merrie MBE Tel: 07596 112270 keith.merrie@nwleicester-shire.gov.uk Head of Finance Tel: 01530 454492 anna.crouch@nwleicester-shire.gov.uk	Former Tenant Rent Arrears, Current Tenant Rent Arrears, Council Tax, Non-Domestic Rates and Sundry Debts Write Offs	Delegated Cabinet function
Tenant Scrutiny Panel Report on Grounds Maintenance and Housing Repairs 207	Cabinet	Non-Key	Public	29 July 2025	Councillor Andrew Woodman Tel: 07970 520357 andrew.woodman@nwleicestershire.gov.uk Principal Housing Management Team Leader Tel: 01530 454700 andrew.wallace@nwleicestershire.gov.uk	Report and Appendix (the TSP findings and recommendations) Tenant Scrutiny Panel Report on Grounds Maintenance and Housing Repairs	The report has been through the Tenant Scrutiny model
Customer Services Annual Report	Cabinet	Key	Public	29 July 2025	Councillor Andrew Woodman Tel: 07970 520357 andrew.woodman@nwleicestershire.gov.uk Customer Services Team Manager nichola.oliver@nwleicestershire.gov.uk	Report Customer Services Annual Report	Corporate Scrutiny Committee - 19 June 2025

Decision	Decision Maker	Status of Decision	Public or Private (and reason – where private)	Date of Decision	Contacts	Documents to be submitted to the Decision Maker	Considered by Scrutiny or other Committee
Supplementary Estimates, Virements and Capital Approvals	Cabinet	Key	Public	29 July 2025	<p>Councillor Keith Merrie MBE Tel: 07596 112270 keith.merrie@nwleicester-shire.gov.uk</p> <p>Head of Finance Tel: 01530 454492 anna.crouch@nwleicester-shire.gov.uk</p>	Supplementary Estimates, Virements and Capital Approvals	N/A - decision delegated to Cabinet under the constitution
Minutes of the Coalville Special Expenses Working Party - 10 June 2025 208	Cabinet	Non-Key	Public	29 July 2025	<p>Councillor Tony Gillard Tel: 01530 452930 tony.gillard@nwleicestershire.gov.uk</p> <p>Head of Property and Regeneration Tel: 01530 454 354 paul.wheatley@nwleicestershire.gov.uk</p>	Report and Minutes of meeting - 10 June 2025 Minutes of the Coalville Special Expenses Working Party - 10 June 2025	The Working Party is a sub-committee of Cabinet
Money Hill Solar PV EV Charging Hub	Cabinet	Key	Private Information relating to the financial or business affairs of any particular person (including the authority holding that information)	29 July 2025	<p>Councillor Michael Wyatt Tel: 07773 341531 michael.wyatt@nwleicestershire.gov.uk</p> <p>Head of Community Services Tel: 01530 454832 paul.sanders@nwleicestershire.gov.uk</p>	Money Hill Solar PV Ev Charging Hub	Delegated Cabinet function

Decision	Decision Maker	Status of Decision	Public or Private (and reason – where private)	Date of Decision	Contacts	Documents to be submitted to the Decision Maker	Considered by Scrutiny or other Committee
Improving the Planning Service's Customer Experience	Cabinet	Key	Private	29 July 2025	<p>Councillor Tony Saffell tonyc.saffell@nwleicester-shire.gov.uk</p> <p>Head of Planning and Infrastructure Tel: 01530 454668 chris.elston@nwleicestershire.gov.uk</p>	Improving the Planning Service's Customer Experience	Delegated Cabinet function
Acquisitions and Disposals 209	Cabinet	Key	Private Information relating to the financial or business affairs of any particular person (including the authority holding that information)Report contains Exempt information	29 July 2025	<p>Councillor Andrew Woodman Tel: 07970 520357 andrew.woodman@nwleicestershire.gov.uk</p> <p>Strategic Director of Communities, Strategic Director of Place Tel: 01530 454819, Tel: 01530 454555 andy.barton@nwleicester-shire.gov.uk, james.arnold@nwleicestershire.gov.uk</p>	Report Acquisitions and Disposals	Delegated Cabinet Function

Decision	Decision Maker	Status of Decision	Public or Private (and reason – where private)	Date of Decision	Contacts	Documents to be submitted to the Decision Maker	Considered by Scrutiny or other Committee
Award of Contracts 210	Cabinet	Key	Private Information relating to the financial or business affairs of any particular person (including the authority holding that information)Contains Exempt information	29 July 2025	Councillor Andrew Woodman Tel: 07970 520357 andrew.woodman@nwleicester.gov.uk Strategic Director of Place, Strategic Director of Communities, Strategic Director of Resources (Section 151 Officer) Tel: 01530 454555, Tel: 01530 454819, Tel: 01530 454495 james.arnold@nwleicestershire.gov.uk, andy.barton@nwleicestershire.gov.uk, paul.stone@nwleicestershire.gov.uk	Report Award of Contracts	Delegated Cabinet Function
August 2025							
Foundations Review - Disabled Facilities Grants Delivery	Cabinet	Key	Public	26 August 2025	Councillor Michael Wyatt Tel: 07773 341531 michael.wyatt@nwleicestershire.gov.uk Head of Community Services Tel: 01530 454832 paul.sanders@nwleicestershire.gov.uk	Foundations Review - Disabled Facilities Grants Delivery	Community Scrutiny, 26 June 2025

[illegible]

Decision	Decision Maker	Status of Decision	Public or Private (and reason – where private)	Date of Decision	Contacts	Documents to be submitted to the Decision Maker	Considered by Scrutiny or other Committee
Workforce Strategy	Cabinet	Key	Public	23 September 2025	<p>Councillor Nicholas Rushton Tel: 01530 412059 nicholas.rushton@nwleicestershire.gov.uk</p> <p>Head of Human Resources and Organisation Development hannah.panter@nwleicestershire.gov.uk</p>	Workforce Strategy	Corporate Scrutiny Committee, 13 March 2025
Good Design Guide for North West Leicestershire	Cabinet	Key	Public	23 September 2025	<p>Councillor Tony Saffell tonyc.saffell@nwleicestershire.gov.uk</p> <p>Head of Planning and Infrastructure Tel: 01530 454668 chris.elston@nwleicestershire.gov.uk</p>	Good Design Guide for North West Leicestershire	Community Scrutiny Committee, 10 April 2025
Supplementary Estimates, Virements and Capital Approvals	Cabinet	Key	Public	23 September 2025	<p>Councillor Keith Merrie MBE Tel: 07596 112270 keith.merrie@nwleicestershire.gov.uk</p> <p>Head of Finance Tel: 01530 454492 anna.crouch@nwleicestershire.gov.uk</p>	Supplementary Estimates, Virements and Capital Approvals	N/A - decision delegated to Cabinet under the constitution.

October 2025

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Decision	Decision Maker	Status of Decision	Public or Private (and reason – where private)	Date of Decision	Contacts	Documents to be submitted to the Decision Maker	Considered by Scrutiny or other Committee
Supplementary Estimates, Virements and Capital Approvals	Cabinet	Key	Public	13 January 2026	Councillor Keith Merrie MBE Tel: 07596 112270 keith.merrie@nwleicester-shire.gov.uk Head of Finance, Tel: 01530 454492, anna.crouch@nwleicester-shire.gov.uk, deborah.proctor@nwleicester-shire.gov.uk	Supplementary Estimates, Virements and Capital Approvals	N/A - decision delegated to Cabinet under the constitution.
3 February 2026 There are no items for this meeting.							
24 February 2026							
Supplementary Estimates, Virements and Capital Approvals	Cabinet	Key	Public	24 February 2026	Councillor Keith Merrie MBE Tel: 07596 112270 keith.merrie@nwleicester-shire.gov.uk Head of Finance Tel: 01530 454492 anna.crouch@nwleicester-shire.gov.uk	Supplementary Estimates, Virements and Capital Approvals	N/A - decision delegated to Cabinet under the constitution.
March 2026 There are no items for this meeting.							

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Decision	Decision Maker	Status of Decision	Public or Private (and reason – where private)	Date of Decision	Contacts	Documents to be submitted to the Decision Maker	Considered by Scrutiny or other Committee
Supplementary Estimates, Virements and Capital Approvals	Cabinet	Key	Public	19 May 2026	<p>Councillor Keith Merrie MBE Tel: 07596 112270 keith.merrie@nwleicester-shire.gov.uk</p> <p>Head of Finance Tel: 01530 454492 anna.crouch@nwleicester-shire.gov.uk</p>	Supplementary Estimates, Virements and Capital Approvals	N/A - decision delegated to Cabinet under the constitution.

June 2026

There are no items for this meeting.

Supplementary Estimates, Virements and Capital Approvals	Cabinet	Key	Public	23 June 2026	<p>Councillor Keith Merrie MBE Tel: 07596 112270 keith.merrie@nwleicester-shire.gov.uk</p> <p>Head of Finance Tel: 01530 454492 anna.crouch@nwleicester-shire.gov.uk</p>	Supplementary Estimates, Virements and Capital Approvals	N/A - decision delegated to Cabinet under the constitution.
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