

**Corporate**  
**Performance Report**  
**Q3 2018/19**  
(October – December 2018)

**Final version**



**Report Publication Date: 8 February 2019**

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## RAG Rating Legend

### Performance Indicators RAG Legend

|                  |                          |
|------------------|--------------------------|
| <b>Data only</b> | Data only KPI, no target |
| <b>Green</b>     | On target                |
| <b>Amber</b>     | Up to 5% off target      |
| <b>Red</b>       | More than 5% off target  |

### Service Plans, Internal Audit, Project Management RAG

|   |
|---|
| <b>Completed</b>                          |
| <b>On track</b>                           |
| <b>Off track - action taken / in hand</b> |
| <b>Off track - requires escalation</b>    |
| <b>Cancelled</b>                          |

# 1. Corporate Dashboard – All Services

## Quarter 3 2018-19 - Performance Summary from the Management Board on Key Successes, Lessons Learnt, Areas of Concern

### **Chief Executive's quarterly report:**

Performance in Quarter 3 was very good overall, with most performance indicators and service actions on track. The Service chapters provide commentary and detail, focusing on those areas of the Council's business that require intervention to bring them back on track.

Particular headlines from Quarter 3 are:

- The Council's financial position continues to be positive, with a favourable variance to the budget currently being forecast.
- Opening 24 new council-owned homes in Farncombe.
- Full Council adoption of the Economic Development and HR Strategies and the Community Infrastructure Levy schedule, which will drive progress and improvement in those areas in support of the Corporate Strategy.
- Agreeing the new waste and recycling contractor, Biffa.
- The opening of the refurbished Memorial Hall in Farnham.
- The successful defence of the Council's Local Plan in the High Court, and revising the timeline for the Local Plan Part 2.
- Planning approval for a new visitors' centre at Frensham Great Pond and Common.
- Unsuccessfully defending our planning refusal for the application at Folly Hill and lobbying the Government on its implications.
- Approving a Public Space Protection Order to combat dog fouling.
- Responding to Surrey County Council's consultation on service changes.

In the coming months, we are focusing on:

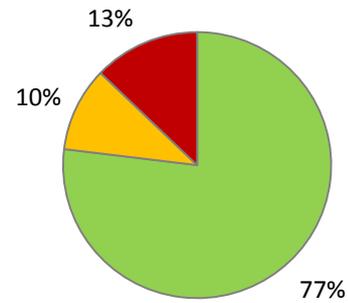
- The May 2019 borough, parish and town elections and other polling contingencies.
- Finalising the Council's Budget and Medium Term Financial Plan, in the context of an exceptionally challenging financial position and the implications of any decisions on services by Surrey County Council.
- Implementing the Community Infrastructure Levy.
- Preparing for the new waste contract to go live in November and procuring a ground maintenance contractor.
- Tackling the incidence of non-pneumophila legionella in one of our properties.
- Continuing to support the Police investigation into air quality data.
- Brexit-related contingency planning.

***Tom Horwood, Chief Executive***

## Performance Indicators Status

### Q3 All Corporate KPIs

|  |             |           |
|--|-------------|-----------|
| <b>Total</b>                           | <b>100%</b> | <b>39</b> |
| <b>Green</b>                           | <b>77%</b>  | <b>30</b> |
| <b>Amber - less than 5% off target</b> | <b>10%</b>  | <b>4</b>  |
| <b>Red - over 5% off target</b>        | <b>13%</b>  | <b>5</b>  |
| <b>Data only</b>                       | <b>N/A</b>  | <b>12</b> |

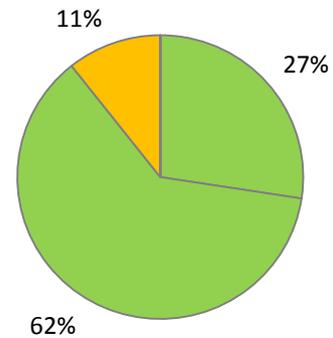


**Comment:** The services performed well in the third quarter with 77% of indicators performing on target, remaining at the same level as the preceding quarter. The service specific dashboards contain further details on underperforming indicators and what actions are being taken.

## Service Plans - Actions Status

### Q3 Corporate Service Plans

|   |             |            |
|---|-------------|------------|
| <b>Total</b>                              | <b>100%</b> | <b>197</b> |
| <b>Completed</b>                          | <b>27%</b>  | <b>54</b>  |
| <b>On track</b>                           | <b>62%</b>  | <b>122</b> |
| <b>Off track - action taken / in hand</b> | <b>11%</b>  | <b>21</b>  |
| <b>Off track - requires escalation</b>    | <b>0%</b>   | <b>0</b>   |
| <b>Cancelled</b>                          | <b>0%</b>   | <b>0</b>   |



**Comment:** The majority of service plan actions are on target. The details of service specific performance can be found under individual dashboards.

## Internal Audit – Overdue Actions Status

**Note:** The Internal Audit section is included for information only, as the scrutiny function of this service area falls under the remit of Audit Committee, which monitors the Internal Audit recommendations at their quarterly meetings. For further details, please refer to the most recent progress report from the Committee meeting on the 24 July.

**Comment:** At the end of the third quarter there was 1 outstanding Internal Audit action. Further details can be found under service specific dashboards.

# Complaints

## Q3 2018-19 (1 October 2018 - 31 December 2018)

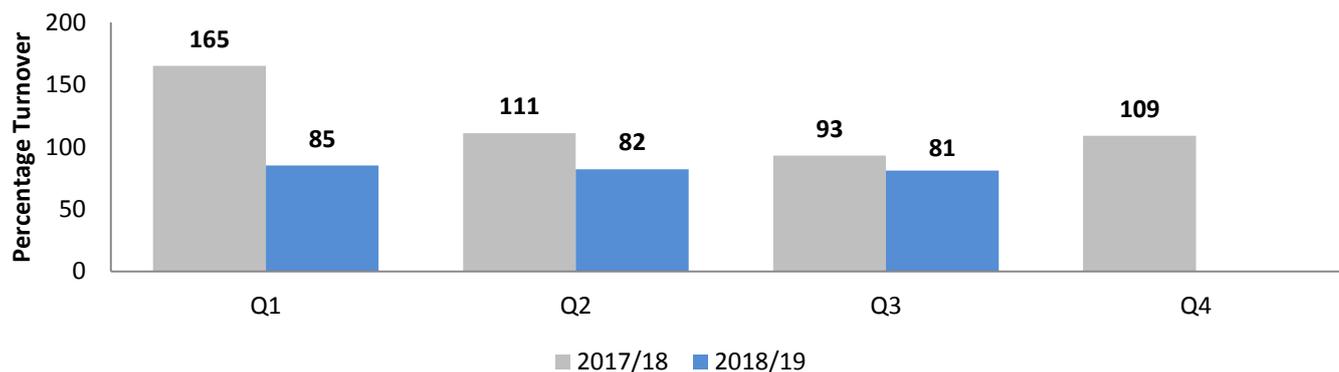
| Service Area                   | Level 1 (10 working days)  |                    |               | Level 2 (15 working days)  |                    |               | Ombudsman                                     |                         |
|--------------------------------|----------------------------|--------------------|---------------|----------------------------|--------------------|---------------|---|-------------------------|
|                                | Total Number of Complaints | Dealt with on time | Response Rate | Total Number of Complaints | Dealt with on time | Response Rate | Number of Complaints Concluded in the quarter | Status                  |
| Communities                    | 1                          | 1                  | 100%          | 0                          | 0                  | n/a           |   |                         |
| Customer & Corporate           | 1                          | 0                  | 50%           | 1                          | 1                  | 100%          |   |                         |
| Environment                    | 10                         | 10                 | 100%          | 3                          | 2                  | 67%           |   |                         |
| Finance                        | 5                          | 5                  | 100%          | 0                          | 0                  | n/a           |   |                         |
| Housing Operations             | 33                         | 28                 | 85%           | 8                          | 8                  | 100%          | 1   | Not Upheld by Ombudsman |
| Housing Strategy & Development | 2                          | 2                  | 100%          | 0                          | 0                  | n/a           |   |                         |
| Planning                       | 11                         | 4                  | 36%           | 6                          | 5                  | 84%           |   |                         |
| Policy & Governance            | 0                          | 0                  | n/a           | 0                          | 0                  | n/a           |   |                         |
| <b>Total</b>                   | <b>63</b>                  | <b>51</b>          | <b>81%</b>    | <b>18</b>                  | <b>16</b>          | <b>89%</b>    |   |                         |

|                         |           |
|-------------------------|-----------|
| <b>Total Complaints</b> | <b>81</b> |
|-------------------------|-----------|

|         | Response Rate | Target | Status             |
|---------|---------------|--------|--------------------|
| Level 1 | 81.0%         | 95%    | over 5% off target |
| Level 2 | 88.9%         | 95%    | over 5% off target |
| Total   | 82.7%         | 95%    | over 5% off target |

## Total Number of Complaints

1 April 2017 - 31 December 2018



**Comment:** The overall number of complaints has fallen from the previous quarter and is favourable compared to Q3 last year. The overall response rate was impacted by a longer time taken in resolving Level 1 complaints in Planning and the situation is being closely monitored by the Planning Development Manager and the Head of Planning to ensure that Q4 performance comes back on track. A complaint escalated to the Housing Ombudsman in Q2 was resolved in Q3. The Ombudsman agreed with the Council's remedy in offering the tenant compensation for property damage which occurred during a repair.

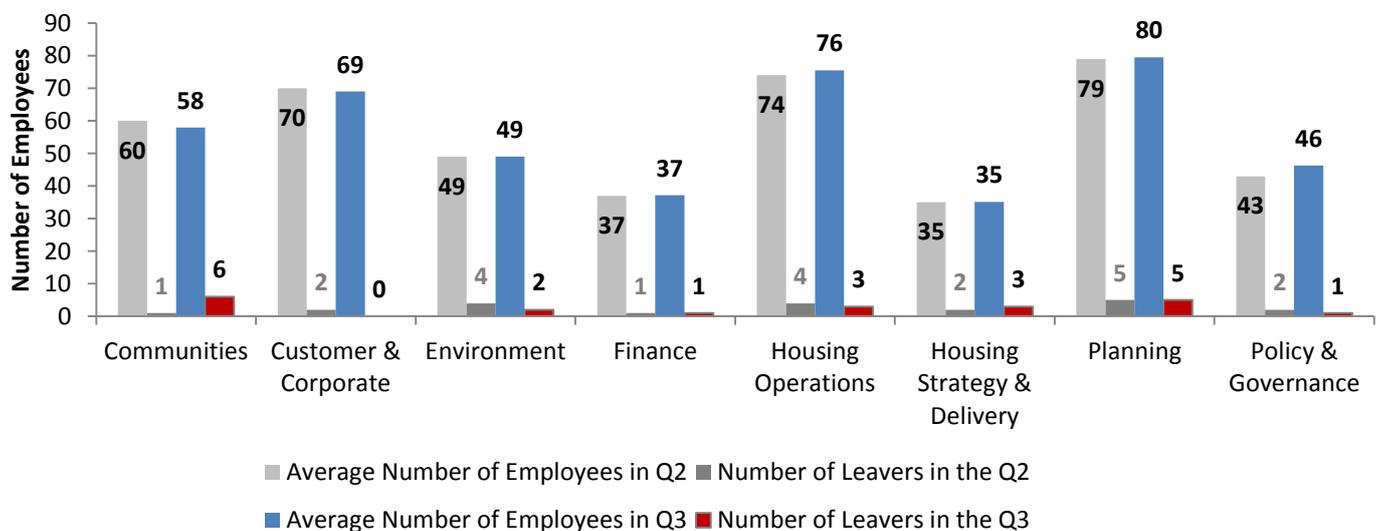
The Corporate Complaints Officer advised that as a result of complaints received in Q3 following corrective actions were taken:

- a review of the Council's procedures for dealing with abandoned vehicles and
- a review of the procedures to be followed by officers when giving advice about entitlement to Universal Credit.

The Senior Management Team has reviewed complaints performance and is reassured that the organisation will be tackling the timeliness shortfall and is learning from issues raised by complainant.

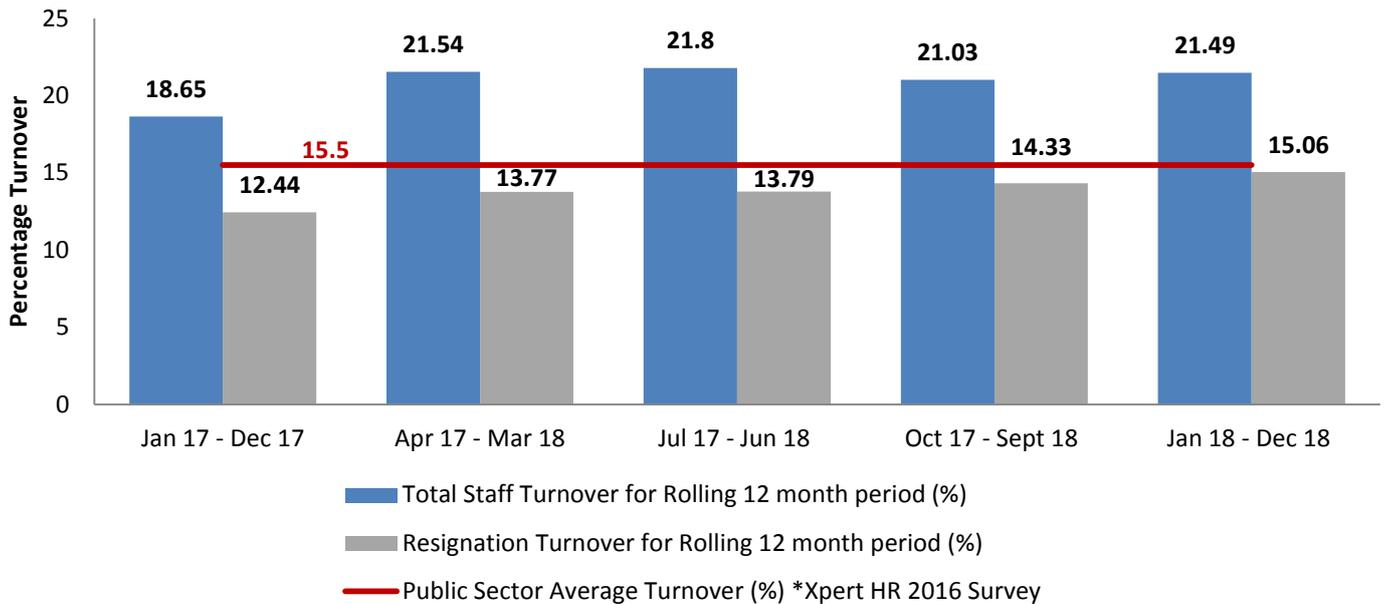
## Workforce data – Corporate Level

### Workforce Levels Q3 2018-19



## Staff Turnover %

Rolling 12 months - Q3 2017/18 - Q3 2018/19



**Comment:** The corporate average of employees in the third quarter was 458 people in total, with 21 leavers in that period. HR Team has revised the exit interviews process to allow collection of more meaningful data. The team is also currently conducting more in depth analysis and the findings will be presented to the Overview and Scrutiny Committee at the June 2019 meeting in the Annual Workforce Profile report. Waverley benchmarks its turnover against the Public Sector Average.

## Absence Data

Rolling 12 months - Q3 2017-18 to Q3 2018-19



**Comment:** There are no areas of particular concern regarding staff sickness levels, which over the year are on track and under public sector averages. In the third quarter the short term sickness level has slightly increased, which isn't unusual for this time of the year with seasonal colds and flu over the autumn / winter period.

## Section 151 Officer quarterly feedback:

I have reviewed the position against budget at the end of quarter three, with particular focus on staff costs and high value income areas. Currently staff costs are within budget and the vacancy target should be slightly exceeded and most income areas are holding up, with the exception of planning and building control which are explained later in the report. The other material areas of cost including contract spend are currently forecast to be on budget. The table below is a summary of more detailed line-by-line monitoring work done during the quarter by spending officers supported by the finance team. Where material variances are forecast, the comments of the Heads of Service are shown in the tables later in the performance report.

To improve transparency of the figures and assist councillors to understand the monitoring position, an alternative presentation of the spend and budget is given in appendix A. This shows the costs and income items by type rather than summarised by service.

**Graeme Clark, Strategic Director (and Section 151 Officer)**

| Row Labels                            | Approved Budget '000 | Forecast Outturn '000 | Forecast Variance '000 | Adverse/ Favourable |
|---------------------------------------|----------------------|-----------------------|------------------------|---------------------|
| <b>Community</b>                      |                      |                       |                        |                     |
| Expenditure                           | 11,043               | 11,020                | -23                    | Favourable          |
| Income                                | -8,871               | -8,877                | -6                     | Favourable          |
| <b>Community Total</b>                | <b>2,172</b>         | <b>2,143</b>          | <b>-29</b>             | <b>Favourable</b>   |
| <b>Customer &amp; Corporate</b>       |                      |                       |                        |                     |
| Expenditure                           | 5,940                | 5,843                 | -97                    | Favourable          |
| Income                                | -6,586               | -6,517                | 69                     | Adverse             |
| <b>Customer &amp; Corporate Total</b> | <b>-646</b>          | <b>-674</b>           | <b>-28</b>             | <b>Favourable</b>   |
| <b>Environment</b>                    |                      |                       |                        |                     |
| Expenditure                           | 10,738               | 10,712                | -26                    | Favourable          |
| Income                                | -9,327               | -9,327                | 0                      | N/A                 |
| <b>Environment Total</b>              | <b>1,411</b>         | <b>1,385</b>          | <b>-26</b>             | <b>Favourable</b>   |
| <b>Finance</b>                        |                      |                       |                        |                     |
| Expenditure                           | 5,761                | 5,955                 | 194                    | Adverse             |
| Income                                | -4,392               | -4,763                | -371                   | Favourable          |
| <b>Finance Total</b>                  | <b>1,369</b>         | <b>1,192</b>          | <b>-177</b>            | <b>Favourable</b>   |
| <b>Planning</b>                       |                      |                       |                        |                     |
| Expenditure                           | 8,777                | 8,739                 | -38                    | Favourable          |
| Income                                | -6,536               | -6,391                | 145                    | Adverse             |
| <b>Planning Total</b>                 | <b>2,241</b>         | <b>2,348</b>          | <b>107</b>             | <b>Adverse</b>      |
| <b>Policy &amp; Governance</b>        |                      |                       |                        |                     |
| Expenditure                           | 6,782                | 6,770                 | -12                    | Favourable          |
| Income                                | -3,864               | -3,856                | 8                      | Adverse             |
| <b>Policy &amp; Governance Total</b>  | <b>2,918</b>         | <b>2,914</b>          | <b>-4</b>              | <b>Favourable</b>   |
| <b>Housing Operations</b>             |                      |                       |                        |                     |
| Expenditure                           | 32,201               | 32,200                | -1                     | Favourable          |
| Income                                | -33,025              | -32,998               | 27                     | Adverse             |
| <b>Housing Operations Total</b>       | <b>-824</b>          | <b>-798</b>           | <b>26</b>              | <b>Adverse</b>      |
| <b>Housing Strategy</b>               |                      |                       |                        |                     |
| Expenditure                           | 3,442                | 3,676                 | 234                    | Adverse             |
| Income                                | 0                    | -167                  | -167                   | Favourable          |
| <b>Housing Strategy Total</b>         | <b>3,442</b>         | <b>3,509</b>          | <b>67</b>              | <b>Adverse</b>      |
| <b>Grand Total</b>                    | <b>12,083</b>        | <b>12,019</b>         | <b>-64</b>             | <b>Favourable</b>   |

## 2. Service Dashboard – Customer & Corporate Services

*This service area covers teams of Facilities, IT, Office Support, Estates, Property & Engineering.*

### Key Successes & Lessons Learnt, Areas of Concern – Q3

#### **Head of Service quarterly feedback:**

This quarter significant issues to note are:

Customer Services - The Project is now well underway with the Programme Board having met twice. Staff briefings are programmed for January/February.

IT - The replacement core Building Control/Planning system is due to go live in February for Building Control, this is clearly a significant milestone and we will be monitoring the implementation closely.

Facilities - As we enter Q4 there are very few members of staff on leave at this time of year which is putting significant pressure on our power parameters, IT systems and parking capacity. We have carried out an initial viability study on our overall office accommodation needs and will be considering our options in Q4.

Property - We are progressing the Council decision to set up a Property Company. The report detailing this will be coming to the Investment Advisory Board and Overview & Scrutiny Committee in due course. We have looked in detail at a retail investment opportunity in Farnham and decided not to proceed and we will now be bringing forward another opportunity in Godalming for consideration.

#### Areas of Concern:

- Management of the customer services project is very time intensive, but within existing capacity and prioritisation
- Marketing one of our commercial properties which currently has a vacancy
- Recruitment of a replacement Engineer as this is an area where it has proved difficult to recruit to in the past.

***David Allum, Head of Customer and Corporate Services***

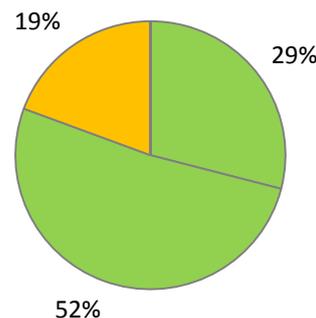
### Performance Indicators Status Q3

**Comment:** This service area does not have any established KPIs. The current customer service review will be exploring what measures could be used for performance monitoring in the future. This service consists of following teams: Facilities, IT, Office Support, Estates, Property & Engineering.

## Service Plans - Actions Status Q3

### Q3 Cust & Corporate Service Plans

| Total                              | 100% | 31 |
|------------------------------------|------|----|
| Completed                          | 29%  | 9  |
| On track                           | 52%  | 16 |
| Off track - action taken / in hand | 19%  | 6  |
| Off track - requires escalation    | 0%   | 0  |
| Cancelled                          | 0%   | 0  |



| Code         | Title   | Original Due Date | Revised Due date                          | Status                   | Q3 Actions taken  |
|--------------|---|-------------------|---|--------------------------|---|
| SP18/19CC1.5 | Review and propose revised arrangements for service delivery from locality offices.   | 31/10/18          | Integrated into Customer Service project. | Off track - action taken | The Customer Services Review Delivery work-stream is considering this issue. Proposals are expected by Q3 2019/2020   |
| SP18/19CC2.4 | If required, establish, advise and service the Council's Property Company to enable the acquisition of at least one property every two years.                             | 31/12/18          | 31/03/19                                  | Off track - action taken | It is expected that proposals will be put before Overview & Scrutiny in Q4 2018/2019 and to Investment Board shortly thereafter.  |
| SP18/19CC2.5 | Agree a future option for the replacement of The Burys  | 31/12/18          | 31/03/19                                  | Off track - action taken | The initial feasibility has been carried out. Next step is to commission consultants to carry out a more detailed analysis. This work should be complete by Q4 2019/2020.   |
| SP18/19CC3.5 | Increase Member and Staff user satisfaction levels from the current ratings of 8.1 (Staff - Service Desk), 8.3 (Staff - services other than Service Desk) and 9 (Members) | 31/10/18          | 31/03/19                                  | Off track - action taken | Whilst the survey has been carried out staff satisfaction ratings were slightly down from 8.1 to 7.6 and from 8.3 to 8.2 respectively. The Member Survey is still underway. |
| SP18/19CC6.1 | Increase Member and Staff satisfaction levels with the services provided from the performance recorded in 2017. Average rating from Members was 86% and from Staff 85%.   | 30/11/18          | 31/03/19                                  | Off track - action taken | Staff satisfaction reduced to 82%. The councillor survey is still underway.   |
| SP18/19CC6.4 | Acquire new pool cars to facilitate and improve on existing usage numbers, thereby increasing savings to the Council.   | 30/11/18          | 31/03/2019                                | Off track - action taken | The funding for the pool cars is dependent on expenditure on essential and casual mileage rates falling. So far that has not happened.                                      |

## Internal Audit - Actions Status at Q3

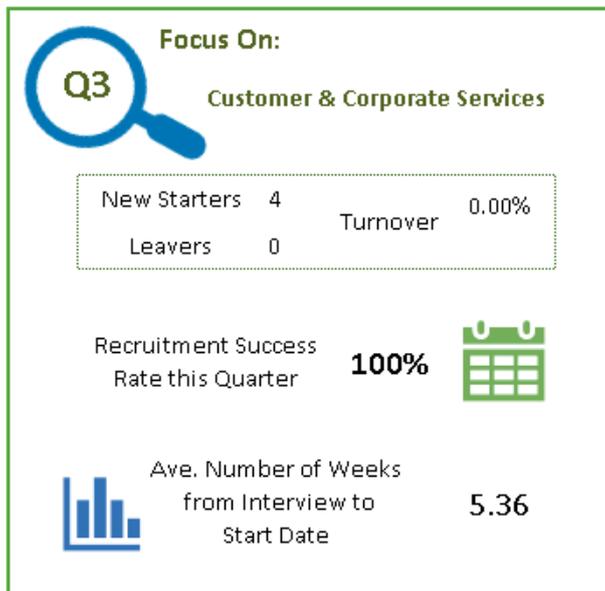
**Comment:** There were no overdue Internal Audit actions for this service area.

## Complaints – Q3 update

| Level              | Level 1 | Level 2 | Ombudsman |
|--------------------|---------|---------|-----------|
| Quarterly Number   | 1       | 1       | N/A       |
| Dealt with on time | 0       | 1       | N/A       |
| Response Time      | 10 days | 15 days |           |
| Response Rate      | 50%     | 100%    | N/A       |

**Comment:** We had one complaint this year from the neighbour of a person who had applied for an easement. There were no procedural or performance learning arising from the complaint.

## Workforce – Q3 update



**Comment:** Q3 was very positive with a number of vacancies filled.

## Finance Update – Q3 update

| Row Labels                            | Approved Budget '000 | Forecast Outturn '000 | Forecast Variance '000 | Adverse/Favourable |
|---------------------------------------|----------------------|-----------------------|------------------------|--------------------|
| <b>Customer &amp; Corporate</b>       |                      |                       |                        |                    |
| Expenditure                           | 5,940                | 5,843                 | -97                    | Favourable         |
| Income                                | -6,586               | -6,517                | 69                     | Adverse            |
| <b>Customer &amp; Corporate Total</b> | <b>-646</b>          | <b>-674</b>           | <b>-28</b>             | <b>Favourable</b>  |

**Head of Service Comment:** The adverse income figure is due to two properties being void and one other which is no longer in our ownership. We have appointed another agent for one and are refurbishing and marketing the second.

### 3. Service Dashboard – Finance

This service includes the following teams: Accountancy, Benefits, Exchequer Services, Insurance, Procurement, Revenues.

#### Key Successes & Lessons Learnt, Areas of Concern - Q3

##### Head of Service quarterly feedback:

Exchequer team: Work on the finance ledger systems has been completed and a significant improvement has been achieved in the payment of invoices as can be seen in the performance indicators below.

Budget setting work has been completed with a balanced draft budget for 2019/20 and clarity on the scale of the financial challenge over the Medium Term Finance Plan. The finance team will work with the Value for Money and Customer Services scrutiny budget Working Group in the coming months to help support the development of plans to resolve this challenge.

**Peter Vickers, Head of Finance**

#### Performance Indicators Status

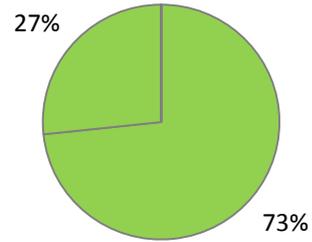
**Comment:** A significant improvement was planned in the F3 and F4 indicators and this has been delivered through improvements to the Agresso finance system.

| KPI         | Description  |      | Q3<br>17-18 | Q4<br>17-18 | Q1<br>18-19 | Q2<br>18-19 | Q3<br>18-19 | Q3<br>Target |
|-------------|--|------|-------------|-------------|-------------|-------------|-------------|--------------|
| F<br>NI181a | Time taken to process Housing Benefit/Council Tax Benefit new claims (lower outturn is better)                             | Days | 12          | 13          | 13          | 13          | 13          | 20           |
| F<br>NI181b | Time taken to process Housing Benefit/Council Tax Support change events (lower outturn is better)                          | Days | 6           | 4           | 7           | 7           | 7           | 9            |
| F1          | Percentage of Council Tax collected (cumulative target Q1-Q4, 24.8%,49.5%, 74.3%, 99.0%) (higher outturn is better)        | %    | 87.3        | 99.3        | 30.2        | 58.1        | 86.2        | 74.3         |
| F2          | Percentage of Non-domestic Rates Collected (cumulative target Q1-Q4, 24.8%,49.5%, 74.3%, 99.0%) (higher outturn is better) | %    | 75.7        | 99.3        | 29.4        | 51.0        | 74.7        | 74.3         |
| F3          | Percentage of invoices paid within 30 days or within supplier payment terms (higher outturn is better)                     | %    | 96.8        | 95.0        | 84.6        | 90.0        | 95.5        | 99.0         |
| F4          | Percentage of invoices from small/ local businesses paid within 10 days (higher outturn is better)                         | %    | 82.1        | 56.4        | 67.7        | 50.0        | 97.0        | 90.0         |

## Service Plans - Actions Status Q3

### Q3 Finance Service Plan Actions

| Total                              | 100% | 15 |
|------------------------------------|------|----|
| Completed                          | 73%  | 11 |
| On track                           | 27%  | 4  |
| Off track - action taken / in hand | 0%   | 0  |
| Off track - requires escalation    | 0%   | 0  |
| Cancelled                          | 0%   | 0  |



**Comment:** The completion of the service plans progresses well, with all objectives on track for completion.

## Internal Audit - Actions Status Q3

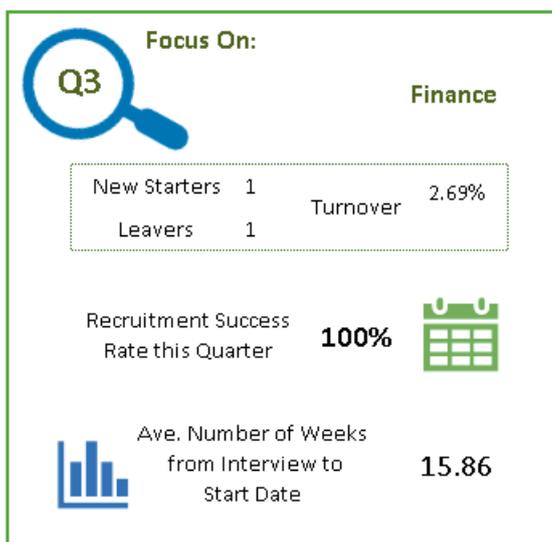
**Comment:** There are no outstanding actions for this service area at the end of Q3 2018-19.

## Complaints Q3

| Level              | Level 1 | Level 2 | Ombudsman |
|--------------------|---------|---------|-----------|
| Quarterly Number   | 5       | 0       | 0         |
| Dealt with on time | 5       | 0       | 0         |
| Response Time      | 10 days | 15 days |           |
| Response Rate      | 100%    | 100%    | N/A       |

**Comment:** All complaints received in Q3 were successfully resolved at level 1 within the target timescale of 10 working days.

## Workforce – Q3 update



**Comment:** No concerns in this area

## Finance Update Q3

| Row Labels           | Approved Budget '000 | Forecast Outturn '000 | Forecast Variance '000 | Adverse/ Favourable |
|----------------------|----------------------|-----------------------|------------------------|---------------------|
| <b>Finance</b>       |                      |                       |                        |                     |
| Expenditure          | 5,761                | 5,955                 | 194                    | Adverse             |
| Income               | -4,392               | -4,763                | -371                   | Favourable          |
| <b>Finance Total</b> | <b>1,369</b>         | <b>1,192</b>          | <b>-177</b>            | <b>Favourable</b>   |

**Head of Service Comment:** Budget is under control and services are on track to deliver within budget. Additional income has been generated from extending money market investments away from 0-3 months to longer than one year where higher returns are being generated, an increase in local authority lending at higher rates and the bank rate increased by 25 basis points during the year.

## 4. Service Dashboard – Policy & Governance

*This service includes the following teams: Legal Services; Democratic Services; Elections; Corporate Policy (including customer complaints); Communications and Engagement; and Human Resources.*

### Key Successes & Lessons Learnt, Areas of Concern

#### **Head of Service quarterly feedback:**

The Policy and Governance team achieved a number of key milestones and successful outcomes during quarter 3, including:

- The successful defence, in October, of two linked High Court challenges against the Council's Local Plan and a further challenge against the Secretary of State's decision to grant planning permission for an 1,800 home settlement at Dunsfold Aerodrome. Deputy High Court Judge, Ms Nathalie Lieven QC dismissed all claims.
- Successful completion of the Annual Canvass, leading to publication of the revised Electoral Register on 1 December. Household Enquiry Forms were issued to 53,000 residences. The extension of the mobile canvassing pilot was very successful. 17 of the 25 canvassers equipped with a tablet. Using the tablet allowed residents to quickly, easily and securely complete their registration online. By the end of the canvass, 97.2% of the households issued with a Household Enquiry form had responded.
- Successful completion of the Haslemere Town Council By-Election in October.
- Following a period of research, development, consultation and scrutiny, the adoption in December of a new Human Resources Strategy for the Council. The strategy sets out a vision for positive and committed staff culture, developing and retaining talented staff and ensuring that Waverley is able to compete effectively in the employment market and be seen as an attractive employer in the local community. Work streams within the strategy are now being progressed.
- The provision of dedicated project management support from the council's Corporate Policy team to the Council's Customer Services Improvement Programme to kick start progress on the next phase of this important area of work.
- Work by the Council's Democratic Services team to develop a comprehensive and effective induction programme for the new intake of Councillors in May 2019.
- The appointment of a new Communications and Engagement Manager who progressed a number of key work streams including the development of a revised Communications and Engagement Strategy and revised work programme for the Council.

***Robin Taylor, Head of Policy & Governance***

## Performance Indicators Status

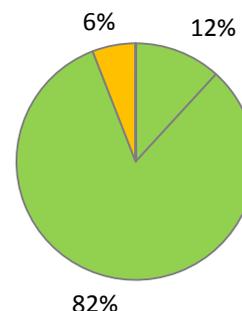
| KPI  | Description  |      | Q3<br>17-18                        | Q4<br>17-18 | Q1<br>18-19 | Q2<br>18-19 | Q3<br>18-19 | Q3<br>Target |           |
|------|--|------|------------------------------------|-------------|-------------|-------------|-------------|--------------|-----------|
| HR1a | Total Staff Turnover for Rolling 12 month period (%) <b>(data only)</b>  | %    | 18.7                               | 21.5        | 21.8        | 21.0        | 21.5        | Data only    |           |
| HR2  | Short & Long term Sickness Absence - Working Days Lost per Employee - Rolling 12 months <b>(lower outturn is better)</b> | Days | 6.1                                | 6.0         | 5.8         | 6.5         | 6.6         | 6.52         |           |
| PG1a | The number of complaints received - Level 1 <b>(data only)</b>   | No.  | Collection started from Q1 2018-19 |             |             | 63          | 57          | 63           | Data only |
| PG1b | The number of complaints received - Level 2 <b>(data only)</b>   | No.  | Collection started from Q1 2018-19 |             |             | 18          | 24          | 18           | Data only |
| PG2a | The % of complaints responded to on time - Level 1 <b>(higher outturn is better)</b>                                     | %    | Collection started from Q1 2018-19 |             |             | 85.0%       | 87.7%       | 79.4%        | 95.0%     |
| PG2b | The % of complaints responded to on time - Level 2 <b>(higher outturn is better)</b>                                     | %    | Collection started from Q1 2018-19 |             |             | 100.0%      | 100.0%      | 88.9%        | 95.0%     |

**Comment:** The levels of sickness have risen slightly in Q3 which is quite typical for the autumn/winter period. The drop in performance of corporate indicator PG2a (% of level 1 complaints responded to on time) relates to a number of planning complaints and the situation is being closely monitored by the Planning Development Manager and Head of Planning. The response rate at level 2 (PG2b) was impacted by two complex cases which took longer to resolve. Although the complaint response rate indicators performed below the target in Q3 the Complaints Officer has confirmed there are no specific areas of concern at the moment. The Senior Management Team has reviewed this data and will be focused on improving response rates in Q4.

## Service Plans - Actions Status Q3

### Q3 P&Gov Service Plans

| Total                              | 100% | 17 |
|------------------------------------|------|----|
| Completed                          | 12%  | 2  |
| On track                           | 82%  | 14 |
| Off track - action taken / in hand | 6%   | 1  |
| Off track - requires escalation    | 0%   | 0  |
| Cancelled                          | 0%   | 0  |



**Comment:** All Service Plan actions are progressing well on target for completion apart from one, further details can be found below.

| Code         | Title   | Original Due Date | Revised Due Date | Status                   | Actions taken to rectify   |
|--------------|---|-------------------|------------------|--------------------------|--|
| SP18/19PG2.1 | Increase levels of community engagement, including participatory budgeting: | 31/12/18          | 30/09/19         | Off track - action taken | The timetable for this piece of work was revised to inform the Medium Term Financial Plan. The work is now scheduled to begin in early June and complete in September. |

## Internal Audit - Actions Status Q3

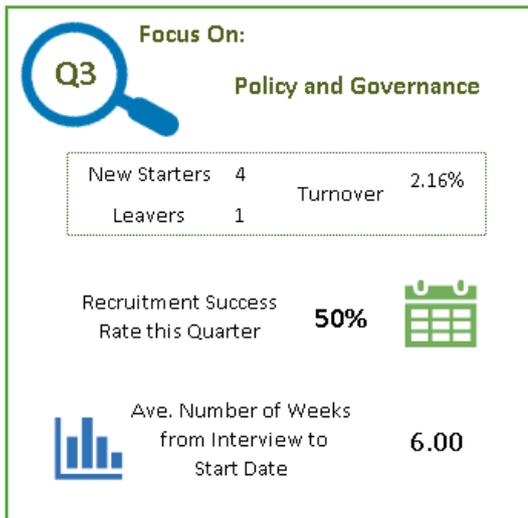
**Comment:** There were no outstanding Internal Audit actions for this service area at the end of Q3.

## Complaints Q3

| Level              | Level 1 | Level 2 | Ombudsman |
|--------------------|---------|---------|-----------|
| Quarterly Number   | 0       | 0       | 0         |
| Dealt with on time | 0       | 0       | 0         |
| Response Time      | 10 days | 15 days |           |
| Response Rate      | N/A     | N/A     | N/A       |

**Comment:** There were no complaints raised against this service area in the third quarter of 2018/19.

## Workforce – Q3 update



**Comment:** A number of staff vacancies were successfully filled during the quarter within the Legal, Corporate Policy and Communications and Engagement teams. Recruitment was also undertaken in respect of two vacancies that arose in the Elections team with new staff due to commence employment in Q4.

## Finance Update Q3

| Row Labels                           | Approved Budget '000 | Forecast Outturn '000 | Forecast Variance '000 | Adverse/ Favourable |
|--------------------------------------|----------------------|-----------------------|------------------------|---------------------|
| <b>Policy &amp; Governance</b>       |                      |                       |                        |                     |
| Expenditure                          | 6,782                | 6,770                 | -12                    | Favourable          |
| Income                               | -3,864               | -3,856                | 8                      | Adverse             |
| <b>Policy &amp; Governance Total</b> | <b>2,918</b>         | <b>2,914</b>          | <b>-4</b>              | <b>Favourable</b>   |

**Head of Service Comment:** Spending within the service is projected to remain within budgets, with a small favourable variance projected.

## 5. Service Dashboard – Communities

*This service area includes the teams of Arts, Community Services, Careline, Leisure, Parks & Countryside and Waverley Training Services*

### Key Successes & Lessons Learnt, Areas of Concern

#### **Q3 Head of Service quarterly feedback summary:**

The Memorial Hall welcomed back its old hirers this quarter creating a vibrant busy Centre throughout the day. We were especially pleased to open our doors on Christmas day for around eighty residents of Farnham who would have been spending their Christmas alone.

The Borough Hall launched its Live Screening offer of the Royal Ballet to a packed house in early December.

The Leisure and Grounds maintenance contracts continue to perform well with complaints remaining low. Work continues on the leisure investment projects for Godalming and Farnham with a project team assembled to take the schemes forward. The Frensham Heathland Hub achieved planning approval and commons consent has now been applied for taking this project to the next stage, we look forward to hearing feedback in the next quarter.

The Communities Team have worked hard supporting our voluntary partners; celebrating the achievement of the Community Meals Service with all the providers as the second year anniversary was reached and all centres feeding back positively; delivering fantastic cultural opportunities for Borough residents with our partnership with The Maltings and Cranleigh Arts Centre to name but two and finally working to support the CAB and HOPPA to deliver their much needed services.

The Economic Development Team are supporting the four Chambers of Commerce to carry out a feasibility study on the introduction of a Business Improvement District (BID). Our team are meeting a host of businesses throughout Waverley gaining valuable feedback. The feasibility study will be completed next quarter.

***Kelvin Mills, Head of Communities and Special Projects***

## Performance Indicators Status Q3

**Comment:** All areas are performing well with overall success rates at Waverley Training Services and Careline critical fault monitoring demonstrating great success.

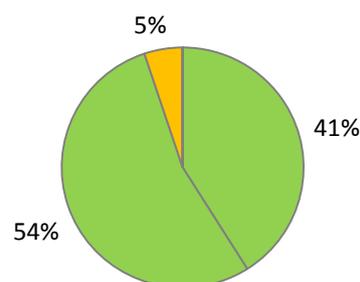
Leisure centre usage has remained high which is pleasing considering the particular challenges being faced in Farnham, around car parking, our largest leisure centre. The Leisure Team in partnership with Places Leisure continue to push our health and wellbeing activities with record participation numbers this quarter, particularly in 60+ sessions and Cranleigh's Friday night youth project, this will continue to be a priority.

| KPI  | Description  |          | Q3 17-18                           | Q4 17-18 | Q1 18-19 | Q2 18-19 | Q3 18-19 | Q3 Target |           |
|------|--|----------|------------------------------------|----------|----------|----------|----------|-----------|-----------|
| C1   | Total number of visits to Waverley leisure centres ( <b>higher outturn is better</b> )   | Visits   | 469,669                            | 536,377  | 501,438  | 462,103  | 473,507  | 448,000   |           |
| C2   | Total number of attendees of the health and wellbeing activities throughout the borough in a quarter ( <b>higher outturn is better</b> ) | Visits   | Collection started from Q1 2018-19 |          |          | 1,374    | 4,007    | 6,112     | Data only |
| CS9  | Total number of Careline clients ( <b>data only, no target set - higher outturn is better</b> )  | Clients  | 1,878                              | 1,841    | 1,826    | 1,835    | 1,863    | Data only |           |
| CS10 | Total number of Careline calls per quarter ( <b>data only, no target set</b> )   | Calls    | 6,775                              | 5,966    | 3,549    | 6,216    | 5,444    | Data only |           |
| CS11 | Critical faults dealt with within 48 hours per quarter ( <b>higher outturn is better</b> )   | Faults % | Collection started from Q1 2018-19 |          |          | 91.1%    | 100.0%   | 100.0%    | 90.0      |
| CS12 | Apprentice overall success rate per quarter ( <b>higher outturn is better</b> )  | %        | 81.0%                              | 77.2%    | 78.3%    | 81.0%    | 82.1%    | 75.0%     |           |
| CS13 | Apprentice timely success rate in gaining qualification in the time expected ( <b>higher outturn is better</b> )                         | %        | 74.0%                              | 72.0%    | 77.1%    | 78.0%    | 70.0%    | 70.0%     |           |
| CS14 | Number of apprentices on study programmes (cumulative year to date with the annual target of 30) ( <b>higher outturn is better</b> )     | No.      | 25                                 | 24       | 29       | 22       | 19       | Data only |           |

## Service Plans - Actions Status Q3

### Q3 Communities Service Plans

| Total                              | 100% | 39 |
|------------------------------------|------|----|
| Completed                          | 41%  | 16 |
| On track                           | 54%  | 21 |
| Off track - action taken / in hand | 5%   | 2  |
| Off track - requires escalation    | 0%   | 0  |
| Cancelled                          | 0%   | 0  |



**Comment:** The update on the off track actions is listed below.

| Code         | Title   | Original Due Date | Revised Due date | Status                   | Actions taken  |
|--------------|---|-------------------|------------------|--------------------------|--|
| SP18/19CS1.2 | Renegotiate new leisure management contract thresholds to increase guaranteed return.               | 31/08/18          | 30/03/19         | Off track - action taken | Negotiations had stalled the issue was escalated and a meeting between the contractor and Strategic Director took place in January. Progress is expected to be made in the next quarter. |
| SP18/19CS4.3 | Investigate potential new services that could benefit our client base and increase usage (Careline) | 31/12/18          | 30/03/19         | Off track - action taken | New backroom processes have been explored to improve customer service this will be implemented over the coming weeks. Once in place further 'offerings' can be explored.                 |

### Internal Audit - Actions Status Q3

**Comment:** At the end Q3 there are no outstanding actions for this service area.

### Complaints Q3

| Level              | Level 1 | Level 2 | Ombudsman |
|--------------------|---------|---------|-----------|
| Quarterly Number   | 1       | 0       | 0         |
| Dealt with on time | 1       | 0       | 0         |
| Response Time      |         |         |           |
| Response Rate      | 100%    | N/A     | N/A       |

**Comment:** All received complaints were resolved at Level 1 within the target time.

## Workforce – Q3 update



**Comment:** The number of leavers in the quarter was negatively impacted by Waverley Training Services team's higher turnover rate as a result new joiners not completing their probation.

## Finance Update

| Row Labels             | Approved Budget '000 | Forecast Outturn '000 | Forecast Variance '000 | Adverse/ Favourable |
|------------------------|----------------------|-----------------------|------------------------|---------------------|
| <b>Community</b>       |                      |                       |                        |                     |
| Expenditure            | 11,043               | 11,020                | -23                    | Favourable          |
| Income                 | -8,871               | -8,877                | -6                     | Favourable          |
| <b>Community Total</b> | <b>2,172</b>         | <b>2,143</b>          | <b>-29</b>             | <b>Favourable</b>   |

**Comment:** All on target

## 6. Service Dashboard – Environment

*This service area includes the following teams: Car Parks, Environmental Health, Environmental Services, Emergency Planning, Finance, Licensing, Sustainability*

### Key Successes & Lessons Learnt, Areas of Concern

The new Refuse, Recycling and Street Cleaning contract was awarded to BIFFA after an extensive procurement and evaluation process and will ensure we are able to deliver high quality services to the residents into the future. The current contractor Veolia continues to provide a good service in the interim.

The review of air quality monitoring sites has been implemented and a new contract has been awarded for the management of our air quality analysers to provide enhanced and up to date information on air quality to residents.

The decision of the Planning Inspector is awaited on the application for the de-registration of Weyhill Fairground car park as common land following the site visit. Work continues on exploring options for the improving South Street car park in Farnham.

Work is progressing on plans to install electric vehicle charging points in four of our main car parks (two charging points in a carpark in each of our main centres of population).

***Richard Homewood, Head of Environmental Services***

### Performance Indicators Status

**Comment:** Our recycling rejection rate at the Materials Recovery Facility remains a concern and work is ongoing with residents to try to ensure they understand what can and can't be recycled. Contamination at our bring sites continues to be a major cause of rejection along with stricter rules on what the MRF can accept driven by international processors stricter specifications. Nationally and internationally the future of recycling is a real concern.

The recycling percentage rate has however continued to improve and residual waste per household has reduced significantly. This may be in part due to the promotion of our food waste service and distribution of several thousand more food caddies to residents.

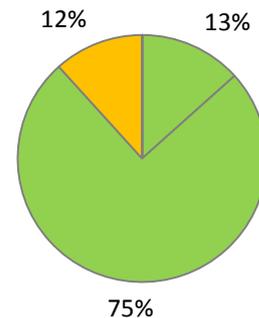
| KPI | Description  |      | Q3<br>17-18 | Q4<br>17-18 | Q1<br>18-19 | Q2<br>18-19 | Q3<br>18-19 | Q3<br>Target |
|-----|--|------|-------------|-------------|-------------|-------------|-------------|--------------|
| E1  | Materials recovery facilities (MRF) Reject Rate ( <b>lower outturn is better</b> ) | %    | 5.3%        | 7.1%        | 11.6%       | 10.5%       | 10.0%       | 5.0%         |
| E2  | Average number of days to remove fly-tips ( <b>lower outturn is better</b> )       | Days | 1.3         | 2.0         | 2.5         | 2.0         | 2.0         | 2.0          |

|         |   |     |       |       |       |        |        |        |
|---------|---|-----|-------|-------|-------|--------|--------|--------|
| E3      | (NI 195) Improved street and environmental cleanliness - levels of litter, detritus, graffiti and fly posting ( <b>higher outturn is better</b> ) | %   | 73.0% | 90.2% | 94.0% | 84.0%  | 90.0%  | 90.0%  |
| E4      | Number of missed bin collections per 104,000 collections per week ( <b>lower outturn is better</b> )  | No. | 26    | 20    | 34    | 35     | 22     | 40     |
| E5      | Percentage of higher risk food premises inspections (category A&B) carried out within 28 days of being due ( <b>higher outturn is better</b> )    | %   | 94.0% | 95.0% | 94.0% | 100.0% | 100.0% | 100.0% |
| E NI182 | Satisfaction of business with local authority regulation services ( <b>higher outturn is better</b> )   | %   | 93.0% | 90.0% | 84.0% | 85.0%  | 100.0% | 85.0%  |
| E NI191 | Residual household waste per household ( <b>lower outturn is better</b> )   | kg  | 91.6  | 91.8  | 95.5  | 88.3   | 70.0   | 90.00  |
| E NI192 | Percentage of household waste sent for reuse, recycling and composting ( <b>higher outturn is better</b> )  | %   | 55.9% | 57.3% | 58.6% | 57.1%  | 59.0%  | 54.0%  |

## Service Plans - Actions Status

### Q3 Environment Service Plan Actions

|   |             |           |
|---|-------------|-----------|
| <b>Total</b>                              | <b>100%</b> | <b>60</b> |
| <b>Completed</b>                          | <b>13%</b>  | <b>8</b>  |
| <b>On track</b>                           | <b>75%</b>  | <b>45</b> |
| <b>Off track - action taken / in hand</b> | <b>12%</b>  | <b>7</b>  |
| <b>Off track - requires escalation</b>    | <b>0%</b>   | <b>0</b>  |
| <b>Cancelled</b>                          | <b>0%</b>   | <b>0</b>  |



**Comment:** The Public Space Protection Order in respect of Dog Fouling was made with effect from 1 January. Consultation feedback on PSPOs in relation to dogs on leads and numbers of dogs is still being reviewed and further proposals on these controls will be brought forward in June. We will continue to liaise with Surrey Police through the Safer Waverley Partnership on the need for PSPOs in relation to anti-social behaviour. Training for dealing with unauthorised encampments is planned for the new year. Food and Health and Safety Service Plans are in draft and in progress. We are currently recruiting a new Emergency Planning and Resilience Officer and once in post reviews of the response arrangements, health and safety and business continuity will progress.

| Code          | Title  | Original Due Date | Revised Due date | Status                   | Actions taken  |
|---------------|--|-------------------|------------------|--------------------------|--|
| SP18/19ES3.3  | Introduction of Public Space Protection Orders for dog issues and anti-social behaviour in partnership with Surrey Police. | 31/12/18          | 31/08/19         | Off track - action taken | 81% Completed - Dog Fouling PSPO made with effect from 1 Jan 2019. Further consultation on Dogs on leads etc. in summer 2019 |
| SP18/19ES3.10 | Implement a procedure training programme for front line field officers for unauthorised encampments                        | 31/12/18          | 31/03/19         | Off track - action taken | 70% completed - Training planned for first quarter of 2019.  |

| Code          | Title  | Original Due Date | Revised Due date | Status                   | Actions taken   |
|---------------|--|-------------------|------------------|--------------------------|---|
| SP18/19ES6.1  | Food Service Plan developed and implemented in accordance with the Food Safety Agency's (FSA) Framework Agreement for Local Authorities                              | 30/06/18          | 31/03/19         | Off track - action taken | 75% completed - Work in progress delayed by other priorities  |
| SP18/19ES6.2  | Health & Safety Service Plan developed and implemented in accordance with the Health and Safety Executive (HSE) Section 18 mandatory guidance for Local Authorities. | 30/06/18          | 31/03/19         | Off track - action taken | 75% completed - Work in progress delayed by other priorities  |
| SP18/19ES8.1  | Review arrangements for supporting the Council's response to civil emergencies   | 30/11/18          | 30/06/19         | Off track - action taken | 80% completed - Emergency Contacts directories and severe weather plan reviewed. Other plans to be reviewed when new EPRO in place                            |
| SP18/19ES9.1  | Review arrangements for ensuring Business Continuity arrangements are in place and are fit for purpose   | 30/11/18          | 30/06/19         | Off track - action taken | 90% completed - Business Continuity Group meeting regularly and Service BCPs under review.  |
| SP18/19ES10.1 | Review arrangements for implementing and monitoring the council's Health and Safety Policies   | 30/11/18          | 30/06/19         | Off track - action taken | 90% completed - Health and Safety Policy, Lone Working Policy, Driving at Work policy and Aggression at Work policies reviewed. Other policy reviews underway |

### Internal Audit - Actions Status Q3

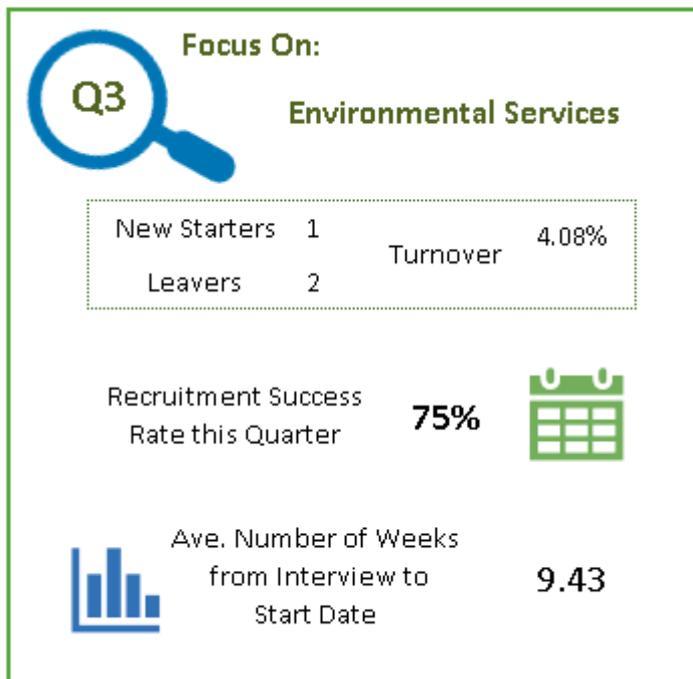
**Comment:** At the end Q3 there are no outstanding actions for this service area.

### Complaints – Q3 update

| Level              | Level 1 | Level 2 | Ombudsman |
|--------------------|---------|---------|-----------|
| Quarterly Number   | 10      | 3       | 0         |
| Dealt with on time | 10      | 2       | 0         |
| Response Time      | 10 days | 15 days |           |
| Response Rate      | 100%    | 67%     | N/A       |

**Comment:** A complaint regarding the disposal of an abandoned vehicle involved a more detailed investigation which subsequently highlighted a need for a review of procedures. Abandoned vehicle procedures have been revised as a result.

## Workforce – Q3 update



**Comment:** The Service has enjoyed a stable workforce over the last quarter. We are currently recruiting a new Emergency Planning and Resilience Officer following the resignation of the post holder as a result of promotion within another public authority.

## Finance Update – Q3 update

| Row Labels               | Approved Budget '000 | Forecast Outturn '000 | Forecast Variance '000 | Adverse/ Favourable |
|--------------------------|----------------------|-----------------------|------------------------|---------------------|
| <b>Environment</b>       |                      |                       |                        |                     |
| Expenditure              | 10,738               | 10,712                | -26                    | Favourable          |
| Income                   | -9,327               | -9,327                | 0                      | N/A                 |
| <b>Environment Total</b> | <b>1,411</b>         | <b>1,385</b>          | <b>-26</b>             | <b>Favourable</b>   |

**Comment:** There has been additional expenditure on garden waste services in quarter 3. Work is underway with the contractor to review this expenditure. The trial car washing franchise in Central Car Park, Farnham has been terminated so anticipated income will not be achieved. Car park income is being closely monitored and it is expected to offset this loss of other income in the next quarter. In spite of some setbacks a favourable variance is expected at the end of the financial year.

## 7. Service Dashboard – Planning

*This Service includes the following Sections: Building Control, Development Management and Planning Policy*

### Key Successes & Lessons Learnt, Areas of Concern

#### **Q3 Head of Service quarterly feedback:**

This has been another quarter characterised by high workloads but of notable success. A number of key actions from the Development Management Improvement Plan were successfully progressed including the new IT development for Building Control and Development Management; increased use of Planning Performance Agreements to support the cost and project management of major developments; the rolling out of electronic consultations to stakeholders and most Parish and Town Councils; progress made on Section 106 Review Project by way of inputting of historic Legal Agreement information into new software database to enable enhanced accessibility to records; continued extension of engagement with stakeholders, Parish and Town Councils via workshops, forums and roadshows.

Management training for middle managers was also completed.

In October, the Council successfully defended all High Court Challenges to the Local Plan Part 1 and to the Dunsfold New Settlement's planning permission. The claimants, CPRE/POW have lodged a challenge on two grounds to the Court of Appeal. The Draft Local Plan Part 2 was not considered by the Council in October but has been deferred until Summer 2019 to allow further discussion on some aspects with the local community. The Council adopted the CIL Charging Schedule on 31 October with a target implementation date of 1 March 2019. Governance arrangements for CIL were approved by the Executive in December 2018.

Project Planning in partnership with Dunsfold Airport Limited has continued, during Q3 in anticipation of implementation of the permission early in 2019.

The Business Plan for Building Control: income position has dipped in Q3 but is still under close scrutiny.

The Review of Street Naming and Numbering processes has been completed and is now fully operational. Income continues to significantly exceed budget expectations.

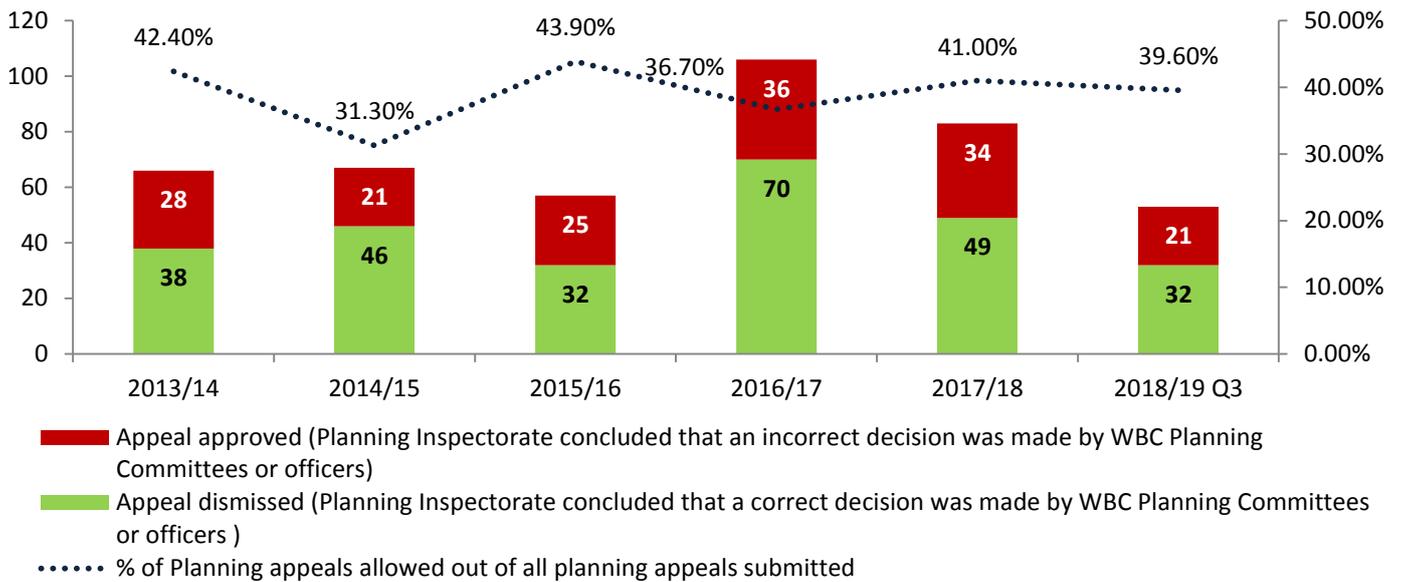
***Elizabeth Sims, Head of Planning***

## Performance Indicators Status

| KPI  | Description   |   | Q3<br>17-18 | Q4<br>17-18 | Q1<br>18-19 | Q2<br>18-19 | Q3<br>18-19 | Q3<br>Target |
|------|---|---|-------------|-------------|-------------|-------------|-------------|--------------|
| P1   | Percentage of all planning applications determined within 26 weeks <b>(higher outturn is better)</b>                              | % | 100.0%      | 99.6%       | 99.1%       | 98.7%       | 99.3%       | 100.0%       |
| P151 | Processing of planning applications: Major applications - % determined within 13 weeks (NI157a) <b>(higher outturn is better)</b> | % | 100.0%      | 93.8%       | 87.5%       | 85.7%       | 100.0%      | 80.0%        |
| P153 | Processing of planning applications: Non-major applications - % determined within 8 weeks <b>(higher outturn is better)</b>       | % | 98.3%       | 97.3%       | 96.2%       | 95.8%       | 93.4%       | 80.0%        |
| P123 | Processing of planning applications: Other applications <b>(higher outturn is better)</b>   | % | 100.0%      | 95.0%       | 100.0%      | 93.3%       | 90.3%       | 90.0%        |
| LP9  | Processing of all other residual applications - % determined within its target (Internal) <b>(higher outturn is better)</b>       | % | 97.0%       | 89.6%       | 93.6%       | 86.2%       | 93.1%       | 80.0%        |
| P2   | All planning appeals allowed (Internal KPI) (cumulative year to date) <b>(lower outturn is better)</b>                            | % | 40.7%       | 41.0%       | 26.9%       | 30.8%       | 39.6%       | 30.0%        |
| P152 | Major planning appeals allowed as a % of Major Application decisions made (cumulative) (P3) <b>(lower outturn is better)</b>      | % | 5.8%        | 9.0%        | 11.8%       | 9.7%        | 7.4%        | 10.0%        |
| P154 | Non-Major planning appeals allowed as a % of Non-Major Application decisions made (cumulative) <b>(lower outturn is better)</b>   | % | 1.7%        | 1.6%        | 1.3%        | 1.2%        | 1.5%        | 10.0%        |
| P4   | Percentage of enforcement cases actioned within 12 weeks of receipt <b>(higher outturn is better)</b>                             | % | 93.7%       | 94.9%       | 94.1%       | 90.9%       | 81.3%       | 75.0%        |
| P5   | Percentage of tree applications determined within 8 weeks <b>(higher outturn is better)</b>                                       | % | 96.1%       | 97.9%       | 90.5%       | 100.0%      | 100.0%      | 95.0%        |
| P8   | Percentage of complete building control applications checked within 10 days <b>(higher outturn is better)</b>                     | % | 86.0%       | 95.0%       | 91.5%       | 93.5%       | 98.7%       | 80.0%        |

**Comment:** The performance on planning appeals (P2) has significantly worsened in the last quarter. This has largely reflected a disagreement between the Council and Planning Inspectors on matters of planning judgement. A comparison (below) with previous quarters shows that this level of performance reflects previous levels going back to 2017. This indicator is, however, a local one and not as critical as the nationally monitored indicators which inform the designation (Special Measures) regime. These are all on track for this quarter but will need monitoring carefully in Q4.

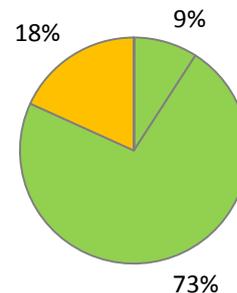
**Planning Inspectorate conclusions  
on Waverley planning appeals  
( January 2013 and December 2018)  
(ref. P2 Local indicator)**



## Service Plans - Actions Status

### Q3 Planning Service Plans

| Total                              | 100% | 22 |
|------------------------------------|------|----|
| Completed                          | 9%   | 2  |
| On track                           | 73%  | 16 |
| Off track - action taken / in hand | 18%  | 4  |
| Off track - requires escalation    | 0%   | 0  |
| Cancelled                          | 0%   | 0  |



Progress on Service Plan actions continues as planned with the majority of objectives expected to be completed on target. There are four actions which are currently off track, but the corrective steps are being taken as detailed below.

| Code        | Title  | Original Due Date | Revised Due Date        | Status                   | Actions taken   |
|-------------|--|-------------------|-------------------------|--------------------------|---|
| SP18/19P1.1 | Develop new IT system for Development Management and Building Control (complete back scanning for Service) | 31/08/18          | Agreed at Q2 - 31/03/19 | Off track - action taken | Familiarisation of system exercise commencing on 21/1/19. Further necessary modification of system identified through this will be prioritised as appropriate. Go Live date for Building Control is 4th February. Development Management module operates on same software platform and will follow with estimated Go Live date of April 2019. |

| Code        | Title  | Original Due Date | Revised Due Date | Status                   | Actions taken  |
|-------------|--|-------------------|------------------|--------------------------|--|
| SP18/19P1.5 | Review decision making structures/numbers of Planning Committees/meetings                              | 31/08/18          | 31/03/19         | Off track - action taken | Report to Environment O and S deferred to allow opportunity for an All Member Workshop to inform report recommendations and Action Plan. Report now scheduled for Environment O and S Committee on 25th February 2019.   |
| SP18/19P2.2 | Section 106 – negotiation, collection and spending mechanisms reviewed and dedicated officer appointed | 31/07/18          | 31/03/19         | Off track - action taken | Additional temporary staff appointed to support the data inputting workload. Data inputting completed. Subject to user testing, public facing module launch intended for February 2019. Town and Parish Councils updated on project progress.                      |
| SP18/19P3.1 | Design Awards ( ref. Local Plan Part 2)  | 31/10/18          | 14/03/2019       | Off track - action taken | Awards Ceremony deferred to Q4 given other key Service priorities, e.g., Local Plan Part 2 and S 106 Monitoring. Ceremony date set for 14 <sup>th</sup> March 2019 at the Memorial Hall, Farnham. Judges' tour completed week commencing 14 <sup>th</sup> January. |

### Internal Audit - Actions Status Q3

**Comment:** There were no outstanding Internal Audit actions for Planning at the end of Q3.

### Complaints Q3 update

| Level              | Level 1 | Level 2 | Ombudsman |
|--------------------|---------|---------|-----------|
| Quarterly Number   | 11      | 6       | 0         |
| Dealt with on time | 4       | 5       | 0         |
| Response Time      | 10 days | 15 days |           |
| Response Rate      | 36%     | 84%     | N/A       |

**Comment:** The response rate on Level 1 and Level 2 complaints has been affected by loss of key personnel in Development Management and high workloads in the quarter. The situation is being closely monitored by the new Development Manager who has developed a more hands-on approach to monitoring of these key targets and an improvement is expected for Q4. The latest data collected at the end of January indicates that the new arrangements are working, as all four level 1 complaints received in that month, were responded to within the 10 working day target.

## Workforce – Q3 update



**Comment:** Turnover remains high. Workloads, committee attendance and extra hours incurred, plus external career advancement, are likely to have contributed to this high level. The Service is continuing to face severe difficulties recruiting to senior professional roles across Planning. Package enhancements are being used e.g., market supplements, to compete with rival authorities for a limited pool of suitable applicants, not necessarily successfully. Vacant posts are being covered by temporary and agency staff but within existing budget. Planning Performance Agreements are being used to secure funds from developers to deliver strategic level development by funding additional temporary staff.

## Finance Update Q3

| Row Labels            | Approved Budget '000 | Forecast Outturn '000 | Forecast Variance '000 | Adverse/ Favourable |
|-----------------------|----------------------|-----------------------|------------------------|---------------------|
| <b>Planning</b>       |                      |                       |                        |                     |
| Expenditure           | 8,777                | 8,739                 | -38                    | Favourable          |
| Income                | -6,536               | -6,391                | 145                    | Adverse             |
| <b>Planning Total</b> | <b>2,241</b>         | <b>2,348</b>          | <b>107</b>             | <b>Adverse</b>      |

**Comment:** Development Management income and Building Control income continue to be lower than expected. This is partially offset by S106 monitoring income and staff vacancy savings. Increased income from Street Naming and Numbering is contributing to overall budget gap. The Senior Management Team has reviewed the financial position and the expectation that all will not be balanced within this service this year, while noting that the Council's overall forecast is essentially on track. Further discussions on the commercialisation and income possibilities of services will be taking place in Q4.

## 8. Service Dashboard – Housing Operations

### Key Successes & Lessons Learnt, Areas of Concern Q3

#### **Head of Service quarterly feedback:**

The main focus in the last quarter has been preparing for the demobilisation of current and mobilisation of the new repairs and maintenance contracts including the responsive repairs and voids, kitchen and bathroom and the framework contracts. Project groups and plans for key work streams have been developed and are progressing.

The team have worked with colleagues in Legal and Finance following the announcement in late November of the change in parent company of the new responsive repairs and voids contractor. Completing due diligence before making a decision regarding the assignment of the contract.

Following the emergence of legionella in the water systems at one of our senior living schemes in Q2 (reported in previous quarters), the Property Services and Senior Living teams continue to monitor the situation and are managing the risk effectively. Recent results have indicated continuing progress in reducing the levels of bacteria. Our contractor has confirmed it is not possible to set a timetable to eradicate legionella and that current progress is as expected. We continue to monitor the situation closely and adapt our response. We are providing updates to the portfolio holder and the management board, tenants and the ward councillors.

The Tenancy and Estates team's work was recognised in November at the Surrey Police ASB Awards. A Tenancy and Estates officer received a nomination for the "Tackling ASB award" following successful joint working with the police to gain repossession of a home in Bramley. The ongoing anti social behaviour case was successfully resolved with a closure order and a possession order. The tenant had allowed his home to be used for drug dealing leading to a significant impact on the neighbours and community.

The Rent Accounts team met the rent collection target this quarter and continue to work with all tenants to promote rent payments and reduce the risk of and level of arrears. Officers are working intensively with the 96 tenants in receipt of Universal Credit often before they have their job coach appointment

In preparation for the winter weather and Christmas closure, the website Out of Hours information was reviewed and updated to provide clear information for emergencies over the winter period.

Only 24 emergency repair calls were received over the Christmas period. The majority were completed with only two requiring follow up work in January.

The Senior Living residents arrange a number of seasonal events and no call outs requests were received by the on call officers during the Christmas closure period.

***Hugh Wagstaff, Head of Housing Operations***

## Performance Indicators Status

| KPI | Description  |      | Q3 17-18 | Q4 17-18 | Q1 18-19 | Q2 18-19 | Q3 18-19 | Q3 Target |
|-----|--|------|----------|----------|----------|----------|----------|-----------|
| H2  | Average number of working days taken to re-let 'normal void' property <b>(lower outturn is better)</b>   | Days | 18       | 19       | 15       | 16       | 21       | 20        |
| H5  | Percentage of estimated annual rent debit collected (cumulative target Q1-Q4, 24.65%,49.30%, 73.95%, 98.65%) <b>(higher outturn is better)</b> | %    | 73.0%    | 97.3%    | 24.9%    | 49.2%    | 76.0     | 74.0%     |
| H6  | Percentage of annual boiler services and gas safety checks undertaken on time <b>(higher outturn is better)</b>                                | %    | 100.0%   | 100.0%   | 100.0%   | 100.0%   | 100.0%   | 100.0%    |
| H7  | Responsive Repairs: How would you rate the overall service you have received? (Tenants' view of the service) <b>(higher outturn is better)</b> | %    | 91.0%    | 91.0%    | 92.0%    | 93.0%    | 89.0%    | 93.0%     |
| H8  | Responsive Repairs: Was repair completed right first time? (Tenants' view of the service) <b>(higher outturn is better)</b>                    | %    | 79.0%    | 74.0%    | 76.0%    | 76.0%    | 78.0     | 78.0%     |
| H9  | Responsive Repairs: Did the tradesperson arrive within the appointment slot? (Tenants' view of the service) <b>(higher outturn is better)</b>  | %    | 98.0%    | 97.0%    | 97.0%    | 98.0%    | 97.0%    | 97.0%     |

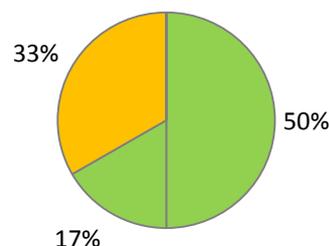
### Comment:

The relet performance (H2) was only one day over target due to a number of homes in exceptionally poor condition and Mears' sub contractors performance. The fall in overall satisfaction with the repairs service (H7) is being closely monitored with the introduction of new initiatives to capture and respond early to any dissatisfaction.

## Service Plans - Actions Status Q3

### Q3 Housing Operations Service Plans

| Total                              | 100% | 6 |
|------------------------------------|------|---|
| Completed                          | 50%  | 3 |
| On track                           | 17%  | 1 |
| Off track - action taken / in hand | 33%  | 2 |
| Off track - requires escalation    | 0%   | 0 |
| Cancelled                          | 0%   | 0 |



**Comment:** Progress according to timelines with five completed actions.

Delay with Family Support Team review and transformation strategy due to external influences and change in team resources and capacity.

| Code        | Title                                   | Due Date | Revised Due date | Status                   | Actions taken to rectify  |
|-------------|---|----------|------------------|--------------------------|---|
| SP18/19H1.1 | Create digital business evolution model | 31/10/18 | 31/03/2019       | Off track - action taken | Not met target date due to Social Housing Green Paper consultation and change in team resources. To be complete end March 2019. |
| SP18/19H2.4 | Review future of Family Support Team    | 30/11/18 | 31/03/2019       | Off track - action taken | A new due date of 31 March 2019 has been requested in order to clarify future with SCC and Waverley budget setting.             |

### Internal Audit - Actions Status Q3

**Comment:** There were no outstanding Internal Audit actions for this service at the end of Q3 2018-19.

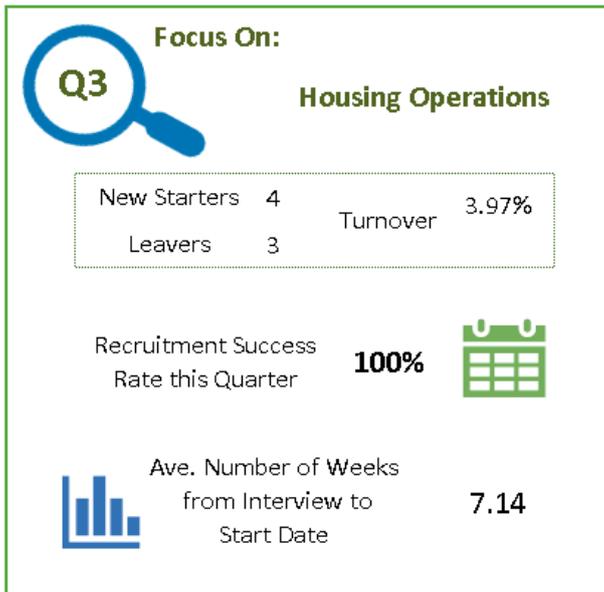
### Complaints

| Level              | Level 1 | Level 2 | Ombudsman |
|--------------------|---------|---------|-----------|
| Quarterly Number   | 33      | 8       | 1 upheld  |
| Dealt with on time | 28      | 8       |           |
| Response Time      | 10 days | 15 days |           |
| Response Rate      | 85%     | 100%    | N/A       |

**Comment:** In the third quarter of 2018/19, 28 out of 33 level one complaints were dealt with on time and all eight complaints escalated to level two were responded to within the target. There were no complaints escalated to the Housing Ombudsman in the quarter, however a Q2 complaint has been resolved in that period as upheld.

The response rate at level one was affected by a handful of complex cases, which took longer to resolve. The lessons learnt are incorporated into the service improvement plan and communicated to managers for action.

## Workforce – Q3 update



**Comment:** No issues to highlight. Turnover of staff as expected and all vacancies are being covered (within budget) while recruitment is being undertaken.

## Finance Update

| Row Labels                      | Approved Budget '000 | Forecast Outturn '000 | Forecast Variance '000 | Adverse/ Favourable |
|---------------------------------|----------------------|-----------------------|------------------------|---------------------|
| <b>Housing Operations</b>       |                      |                       |                        |                     |
| Expenditure                     | 32,201               | 32,200                | -1                     | Favourable          |
| Income                          | -33,025              | -32,998               | 27                     | Adverse             |
| <b>Housing Operations Total</b> | <b>-824</b>          | <b>-798</b>           | <b>26</b>              | <b>Adverse</b>      |

**Head of Service Comment:** Variations for noting - Income £118k under achieved in rents. Interest income £36k over achieved driven by higher base rate. £64K over achieved for lease hold management income due to late billing from prior years. The new Housing Finance Manager reviewing monthly rents reconciliation and leaseholder invoicing processes.

## 9. Service Dashboard – Housing Strategy & Delivery

### Key Successes & Lessons Learnt, Areas of Concern

#### Head of Service quarterly feedback:

**Homelessness prevention:** The team keep numbers of households in temporary accommodation very low and at the time of preparing the report, we are accommodating one household. We continue to manage all the implications of the Homelessness Reduction Act, which involves using a complex IT and reporting system required by central government. A report on the first six months since the Act was introduced was presented to the Housing Overview and Scrutiny Committee on 27 November.

Emergency accommodation was arranged for anyone presenting as homeless over the Christmas period but was not needed. The annual Rough Sleeper Count took place on 14 November, with two rough sleepers being identified in Waverley. Both were known to the Housing Options Team.

**Housing Development:** Work on Site A at Ockford Ridge (37 new homes) will begin in the Spring, with pre-construction work underway from end of January. Preliminary work is underway on the next two phases of refurbishment, as well as two new potential sites for redevelopment on the Ridge. A committee date is awaited for the determination of the application for Site C.

Planning applications have been submitted for sites at Aarons Hill, Godalming (four homes). The scheme at Ryle Road, Farnham (two homes) was recommended for approval but refused by the planning committee. We are now considering what to do next.

A number of other schemes are coming forward and are at various stages of pre application and site assembly. We are also bringing forward our first scheme of five homes in partnership with a private developer under a Section 106 Agreement.

**Private Sector Housing Team/Better Care Fund:** The team has received over 40 new applications for licenses for Houses in Multiple Occupation and all inspections will be completed by the end of January. The new Home Improvement Policy adopted by Council has resulted in an increase in requests for aids and adaptations. The Council works in partnership with Guildford Borough Council to maintain the Home Improvement Agency and the Handyperson service. It is envisaged that Better Care Funding will continue after March 2020.

**Housing Strategy and Enabling:** Monitoring and delivering the first year's objectives of the Housing Strategy 2018-2023 continues and an Annual Progress Review of the Strategy will be prepared and presented to the Housing Overview & Scrutiny Committee, Executive and Council after March 2019; the delivery forecast for 2018/19 is 102 new affordable homes.

The Team are working closely with colleagues in the Planning Service to develop a Supplementary Planning Document on affordable housing which will give internal teams, developers and housing associations clear guidance on the delivery of affordable homes through the planning process. A representative from the team has visited parish and town councils to set out the aims of the Housing Strategy and raise awareness of housing need in the Borough. More visits are in the pipeline.

**Service Improvement Team:** Early stage consultation on Housing Service Plan 2019/2020 has begun.

A home exchange event was held in November with 36 attendees. This was positively received by tenants who fed back that the event was helpful and informative.

The Waverley Homes and People newsletter was issued with annual report data, service advice and

three articles written by tenants.

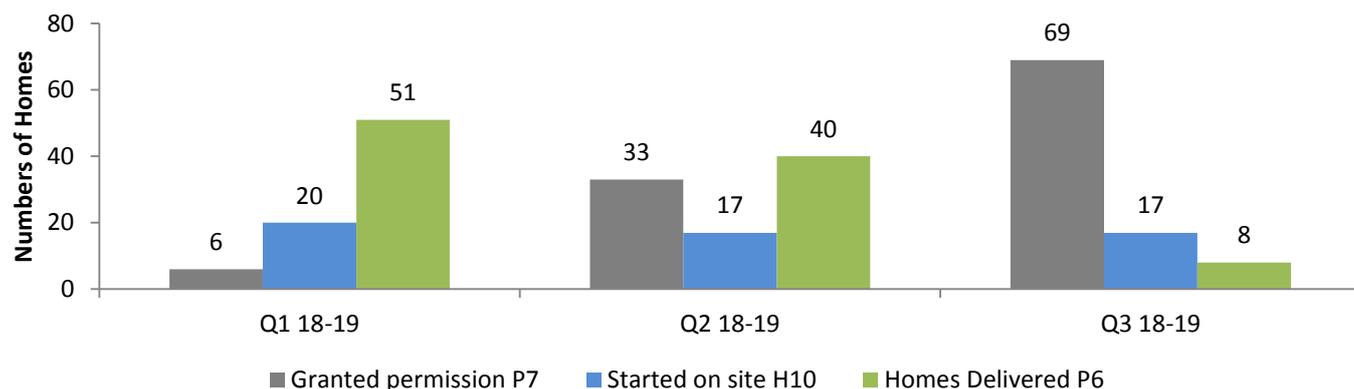
The Service Improvement Manager has supported a Housing Overview and Scrutiny task and finish group on attitudes to Council Housing: 'Pride or Prejudice?' Four tenant drop-in events have been held and surveys have been carried out – the final report will be presented to the full Housing Overview and Scrutiny Committee in February.

**Andrew Smith, Head of Strategic Housing & Delivery**

## Performance Indicators Status

| KPI     | Description  |     | Q3<br>17-18                           | Q4<br>17-18 | Q1<br>18-19 | Q2<br>18-19                            | Q3 18-<br>19 | Q3<br>Target |
|---------|--|-----|---------------------------------------|-------------|-------------|--|--------------|--------------|
| H3      | Housing advice service: Homelessness cases prevented <b>(data only)</b>  | No. | 78                                    | 70          | 36          | Discontinued / replaced by H4a,H4b,H4c |              | Data only    |
| H4a     | Number of homeless households in temporary accommodation at the end of the quarter <b>(lower outturn is better)</b>        | No. | 0                                     | 0           | 1           | 0                                      | 1            | 8.0          |
| H4b     | Number of approaches to the housing options team for housing options/homelessness advice in the quarter <b>(data only)</b> | No. | Data collection started in Q2 2018-19 |             |             | 155                                    | 150          | Data only    |
| H4c     | Number of cases where a prevention of homelessness duty was accepted in each quarter <b>(data only)</b>                    | No. | Data collection started in Q2 2018-19 |             |             | 41                                     | 28           | Data only    |
| P7      | Number of Affordable homes - Granted planning permission <b>(Data only - higher outturn is better)</b>                     | No. | 64                                    | 558         | 6           | 33                                     | 69           | Data only    |
| H10     | Number of Affordable homes - Started on site within a quarter <b>(Data only - higher outturn is better)</b>                | No. | Data collection started in Q1 2018-19 |             | 20          | 17                                     | 17           | Data only    |
| P6 (H1) | Number of affordable homes delivered (gross) <b>(Data only - higher outturn is better)</b>                                 | No. | 12                                    | 52          | 51          | 40                                     | 8            | Data only    |

### Affordable housing delivery January - December 2018

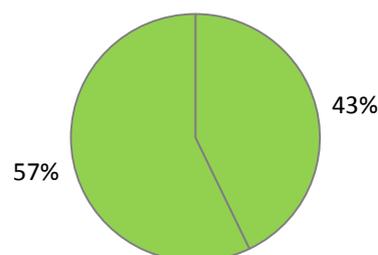


**Comment:** The teams continue to work well in preventing homelessness and delivering new affordable homes.

### Service Plans - Actions Status

#### Q3 Housing Strategy & Delivery Service Plans

|   | 100% | 7 |
|---|------|---|
| <b>Total</b>                              |      |   |
| <b>Completed</b>                          | 43%  | 3 |
| <b>On track</b>                           | 57%  | 4 |
| <b>Off track - action taken / in hand</b> | 0%   | 0 |
| <b>Off track - requires escalation</b>    | 0%   | 0 |
| <b>Cancelled</b>                          | 0%   | 0 |



**Comment:**

All service plan actions are progressing on target for completion. At the end of Q3 3 out of 7 actions have already been completed.

### Internal Audit - Actions Status Q3

The Internal Audit section was included for information only, as the scrutiny function of this service area falls under the remit of Audit Committee, which monitors the Internal Audit recommendations at their quarterly meetings. For further details, please refer to the most recent ["Progress on the Implementation of Internal Audit Recommendations"](#) report from the [Audit Committee meeting 5 November 2018](#).

| Code & Title                | Start Date  | Due Date    | Head of Service        |
|-----------------------------|-------------|-------------|------------------------|
| <b>IA19/05 Safeguarding</b> | 01 Nov 2018 | 31 Dec 2018 | <b>Smith, Andrew +</b> |

**Comment:** All recommendations in the Audit report are being progressed satisfactorily and will be uploaded to Pentana ( performance management application ) by 20 February, in advance of next Audit Committee. It needs to be recognised that the Council's Safeguarding reporting mechanisms and pathways will be determined by new referral procedures to be introduced by Surrey County Council in due course.

## Complaints - Q3 update

| Level              | Level 1 | Level 2 | Ombudsman |
|--------------------|---------|---------|-----------|
| Quarterly Number   | 2       | 0       | 0         |
| Dealt with on time | 2       | 0       | 0         |
| Response Time      | 10 days | 15 days |           |
| Response Rate      | 100%    | N/A     | N/A       |

In the third quarter only two complaints were received which were successfully dealt at level one within the 10 working days timescale.

## Workforce – Q3 update



### Comment:

Housing Options officer post suspended following retirement – to be kept under review.

## Finance Update Q3

| Row Labels                    | Approved Budget '000 | Forecast Outturn '000 | Forecast Variance '000 | Adverse/ Favourable |
|-------------------------------|----------------------|-----------------------|------------------------|---------------------|
| <b>Housing Strategy</b>       |                      |                       |                        |                     |
| Expenditure                   | 3,442                | 3,676                 | 234                    | Adverse             |
| Income                        | 0                    | -167                  | -167                   | Favourable          |
| <b>Housing Strategy Total</b> | <b>3,442</b>         | <b>3,509</b>          | <b>67</b>              | <b>Adverse</b>      |

**Head of Service Comment:** Homelessness rent received in advance is high due to landlords requiring larger deposits before households are placed in private rented accommodation. However, there is a lag behind payments made to landlords. Additional 12K income received through HMO licensing receipts. Offset with expenditure 68K deficit

## 10. Appendix A. Detailed Budget Analysis – Q3 update

|  | 2017/18          | 2018/19                     |                              |                               | Adverse/<br>Favourable<br>Outcome |
|--|------------------|-----------------------------|------------------------------|-------------------------------|-----------------------------------|
|  | Outturn<br>£'000 | Approved<br>Budget<br>£'000 | Forecast<br>Outturn<br>£'000 | Forecast<br>Variance<br>£'000 |                                   |
| <b>Expenditure</b>                         |                  |                             |                              |                               |                                   |
| Building Running Costs                     | 1,653            | 2,099                       | 1,981                        | -118                          | Favourable                        |
| Compensatory grants                        | 58               | 49                          | 52                           | 4                             | Adverse                           |
| Contracted Services                        | 7,075            | 6,771                       | 6,770                        | 0                             | N/A                               |
| Contributions to/from Reserves             | 4,018            | 6,810                       | 6,821                        | 11                            | Adverse                           |
| Depreciation                               | 1,000            | 1,143                       | 1,143                        | 0                             | N/A                               |
| Election Fees                              | 137              |                             |                              |                               | N/A                               |
| Equipment Costs                            | 905              | 1,000                       | 991                          | -9                            | Favourable                        |
| Staff Pay                                  | 18,170           | 19,401                      | 19,368                       | -34                           | Favourable                        |
| Non Pay Staff Costs                        | 1,023            | 944                         | 944                          | 0                             | N/A                               |
| Financial Fees                             | 337              | 331                         | 363                          | 32                            | Adverse                           |
| Grants                                     | 920              | 813                         | 819                          | 5                             | Adverse                           |
| Grounds Maintenance                        | 1,705            | 1,678                       | 1,639                        | -39                           | Favourable                        |
| Housing Repairs                            | 3,861            | 5,232                       | 5,232                        | 0                             | N/A                               |
| Interest Costs                             | 5,795            | 5,917                       | 5,971                        | 54                            | Adverse                           |
| Legal fees                                 | 430              | 358                         | 355                          | -3                            | Favourable                        |
| Mayoralty expenses                         | 11               | 22                          | 22                           | -1                            | Favourable                        |
| Members allowances                         | 374              | 398                         | 398                          | 0                             | N/A                               |
| Members Travel                             | 14               | 18                          | 18                           | 0                             | N/A                               |
| Net Benefit Cost                           | -623             | -587                        | -478                         | 109                           | Adverse                           |
| Net recharges                              | 22,850           | 22,222                      | 22,222                       | 0                             | N/A                               |
| Other expenditure                          | 983              | 6,000                       | 5,985                        | -15                           | Favourable                        |
| Other travel                               | 15               | 20                          | 20                           | 0                             | N/A                               |
| Pension Backfunding Costs                  | 153              | 162                         | 158                          | -4                            | Favourable                        |
| Professional Fees                          | 269              | 337                         | 338                          | 1                             | Adverse                           |
| Rent Costs                                 | 687              | 428                         | 662                          | 234                           | Adverse                           |
| Utilities                                  | 597              | 558                         | 563                          | 4                             | Adverse                           |
| Vehicle Costs                              | 32               | 33                          | 33                           | 0                             | N/A                               |
| Waverley Training Services Sub Contractors | 2,733            | 2,526                       | 2,526                        | 0                             | N/A                               |
| <b>Expenditure Total</b>                   | <b>75,185</b>    | <b>84,684</b>               | <b>84,915</b>                | <b>230</b>                    | <b>Adverse</b>                    |
| <b>Income</b>                              |                  |                             |                              |                               |                                   |
| Building Control Income                    | -453             | -645                        | -509                         | 136                           | Adverse                           |
| Car Park income                            | -5,054           | -5,036                      | -5,036                       | 0                             | N/A                               |
| Careline Income                            | -450             | -447                        | -447                         | 0                             | N/A                               |
| Contributions (e.g. Tenants)               | -42              | -10                         | -10                          | 0                             | N/A                               |
| Fees and charges                           | -868             | -1,013                      | -1,027                       | -14                           | Favourable                        |
| Grant Income                               | -1,472           | -543                        | -539                         | 3                             | Adverse                           |
| Green Waste Income                         | -691             | -831                        | -831                         | 0                             | N/A                               |
| Housing Dwelling Rents                     | -28,579          | -28,397                     | -28,279                      | 118                           | Adverse                           |
| Interest Income                            | -838             | -640                        | -1,048                       | -407                          | Favourable                        |
| Land Charges Income                        | -438             | -405                        | -405                         | 0                             | N/A                               |
| Leisure Centre Profit Share                | -466             | -491                        | -491                         | 0                             | N/A                               |
| Licensing Income                           | -277             | -272                        | -272                         | 0                             | N/A                               |
| Net recharges                              | -24,292          | -24,093                     | -24,095                      | -2                            | Favourable                        |
| Planning Income                            | -1,503           | -1,767                      | -1,744                       | 23                            | Adverse                           |
| Property Income                            | -2,878           | -2,838                      | -2,956                       | -118                          | Favourable                        |
| Reimbursements                             | -4,406           | -3,977                      | -3,948                       | 29                            | Adverse                           |
| Recycling Credit                           | -1,020           | -884                        | -884                         | 0                             | N/A                               |
| Service Charges                            | -299             | -313                        | -377                         | -64                           | Favourable                        |
| Water Rates Collection                     | -18              |                             |                              |                               | N/A                               |
| <b>Income Total</b>                        | <b>-74,045</b>   | <b>-72,601</b>              | <b>-72,896</b>               | <b>-294</b>                   | <b>Favourable</b>                 |
| <b>Grand Total</b>                         | <b>1,141</b>     | <b>12,083</b>               | <b>12,019</b>                | <b>-64</b>                    | <b>Favourable</b>                 |