



Please ask for Charlotte Kearsey
Direct Line: 01246 345236
Email: committee.services@chesterfield.gov.uk

The Chair and Members of
Employment and General Committee

17 January 2020

Dear Councillor,

Please attend a meeting of the EMPLOYMENT AND GENERAL COMMITTEE to be held on MONDAY, 27 JANUARY 2020 at 10.00 am in Committee Room 2, Town Hall, Rose Hill, Chesterfield, the agenda for which is set out below.

AGENDA

Part 1(Public Information)

1. Declarations of Members' and Officers' Interests relating to Items on the Agenda
2. Apologies for Absence
3. Minutes (Pages 3 - 6)
4. Job Evaluation Policy (Pages 7 - 36)
5. Travel and Subsistence Policy (Pages 37 - 60)
6. Calculation of Tax Base 2020/21 (Pages 61 - 68)
7. Non-Domestic Rates Estimates for 2020/21 (Pages 69 - 90)
8. Minutes of the Employer / Trade Union Committee (Pages 91 - 96)
9. Minutes of the Council Health and Safety Committee (Pages 97 - 100)

Chesterfield Borough Council, Town Hall, Rose Hill, Chesterfield S40 1LP

Telephone: 01246 345 345, Text: 07960 910 264, Email: info@chesterfield.gov.uk

www.chesterfield.gov.uk

Yours sincerely,

A handwritten signature in black ink, appearing to be 'Randy', written in a cursive style.

Local Government and Regulatory Law Manager and Monitoring Officer

EMPLOYMENT AND GENERAL COMMITTEE**Monday, 4th November, 2019**

Present:-

Councillor T Murphy (Chair)

Councillors Davenport
Brittain

Councillors K Falconer

*Matters dealt with under the Delegation Scheme

**12 DECLARATIONS OF MEMBERS' AND OFFICERS' INTERESTS
RELATING TO ITEMS ON THE AGENDA**

No declarations of interest were received.

13 APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillors Blank and Simmons.

14 MINUTES**RESOLVED –**

That the Minutes of the Meeting of the Committee held on 9 September, 2019 be approved as a correct record and signed by the Chair.

**15 REVIEW OF POLLING DISTRICTS AND POLLING PLACES IN THE
BOROUGH OF CHESTERFIELD (EC010)**

The Electoral Services Manager submitted a report on the statutory review of polling places and polling districts.

Under the Representation of the People Act 1983, the Council has a duty to review parliamentary polling districts and places within a period of 16 months beginning with 1 October, 2013 and every fifth year thereafter. The last review was conducted in 2014 and therefore the next must be completed by January 2020.

The officer's report included details of the consultation process which had been carried out.

Returning Officers are required to have regard for accessibility issues for people with disabilities when designating polling places. All of the premises used for polling places in the Borough are accessible 'so far as is reasonable and practicable'.

***RESOLVED –**

1. That the proposals arising from the 2019 review of polling places and polling districts detailed in Appendix A of the officer's report be approved.
2. That the Returning Officer be authorised to designate alternative polling places for those where there are issues should this be possible.

REASON FOR DECISION –

To comply with the Electoral Registration and Administration Act 2013.

16 CHRISTMAS/NEW YEAR DISCRETIONARY DAY 2019/20

The HR and Support Services Manager submitted a report seeking approval for the chosen Christmas and New Year 2019/20 discretionary day.

At Council Minute No.577 (2001/2002) it was resolved that the discretionary day for Christmas and New Year would be decided each January for that year. At the January 2004 Council Joint Consultative Committee it was resolved that the Christmas and New Year discretionary day would be decided at the preceding years October Council Joint Consultative Committee. Following the decision to disband the Council Joint Consultative Committee in 2016 this decision would be made by the Employment and General Committee.

The three options for the discretionary day were outlined as:-

- Tuesday 24 December, 2019;
- Friday 27 December, 2019;

- Tuesday 31 December, 2019.

A staff poll had been conducted on the council intranet and over 76% of respondents expressed a preference for Friday 27 December, 2019.

***RESOLVED –**

That the Christmas and New Year 2019/2020 discretionary day be approved as 27 December, 2019 for all staff.

17 **ANNUAL PERFORMANCE REPORT**

The HR and Support Services Manager submitted a report to provide an overview of performance against the Council's Human Resources key performance measures.

The HR Team was transferred from the Arvato Public Private Partnership to in-house service delivery in October 2018.

The HR team was restructured and merged with the Council's support services function. The HR team was strengthened to include three new HR Business Partner roles and a new Learning and Development Business Partner role. The restructure aimed to enable the HR team to deliver a proactive service and can better meet individual needs of service areas.

The report outlined the strategic activities carried out by the HR and Support Services team during the financial year 2018/19 and plans for 2019/20.

RESOLVED –

That the report be noted and future actions endorsed.

18 **MINUTES OF THE COUNCIL HEALTH AND SAFETY COMMITTEE**

The Minutes of the meeting of the Council Health and Safety Committee held on 21 August, 2019 were submitted.

RESOLVED –

That the Minutes be received and noted.

FOR PUBLICATION

JOB EVALUATION POLICY

MEETING: EMPLOYMENT AND GENERAL COMMITTEE
DATE: 27 January 2020
REPORT BY: SANDY GILLHAM-HARDY, HR BUSINESS PARTNER.

1.0 PURPOSE OF REPORT

To provide information regarding the new Job Evaluation policy and to recommend the policy for approval.

2.0 BACKGROUND

Local Job Evaluation arrangements have existed since the Local Collective Agreement in 2006 and required updating. The Council use the nationally agreed National Joint Council (NJC) job evaluation scheme supplemented by this local policy to ensure fairness, transparency and consistency and to comply with equal pay legislation.

The policy applies to all posts within the scope of the NJC green book terms and conditions for Local Government services. The policy sets out the procedure to be followed to initiate a Job Evaluation for the purposes of re-evaluating an existing job or to grade a new job. It also describes the appeals process.

Posts within the scope of the Joint Negotiating Committee for Chief Officers and Craft and Associated employees (red book terms and conditions) are not covered by this policy.

3.0 PROPOSED PROCEDURE

The aim of the policy is to provide guidance to employees and managers regarding the job evaluation of Chesterfield Borough Council job roles. Job Evaluation is a process that seeks to objectively measure the different elements or parts of a job using information provided by managers such as job descriptions and person specifications. Each element is analysed systematically to give an overall score for the job role. All jobs are scored in the same way, giving a comparison of jobs across the organisation.

In using the NJC Scheme, the council is demonstrating its commitment to operating staffing structures which are free from discrimination.

Furthermore, the council is committed to challenging pay inequalities and ensuring equal pay for work of equal value for all employees.

The policy replaces the job evaluation arrangements within the existing Local Collective Agreement with the Trade Unions.

Further training will be provided to managers on the Job Evaluation scheme to ensure they have a better understanding of the detail of the scheme and the impact their decisions may have on the Council.

The revised policy can be found at appendix A.

A full Equality Impact Assessment has been completed and is attached for information at appendix B.

4.0 EMPLOYER – TRADE UNION COMMITTEE

The proposed policy was submitted to the Employer trade union Committee on 13 January 2020 and was endorsed for submission to Employment and General Committee.

5.0 RECOMMENDATION

That the new Job Evaluation Policy be approved.

For further information on this report, contact Sandy Gillham-Hardy.

Job Evaluation Policy

Prepared by: Human Resources

Approved by Employment and General Committee:
For review:

version 9

30/12/19



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SECTION 1: GENERAL GUIDING PRINCIPLES

POLICY STATEMENT

1. Chesterfield Borough Council will use the nationally agreed National Joint Council (NJC) job evaluation scheme as outlined in the Green Book terms and conditions for Local Government Services, supplemented by this local policy to ensure fairness, transparency and consistency and to comply with equal pay legislation. As a joint process, trade unions will be involved at each stage of the evaluation procedure including consultation, Job Evaluation (JE) and appeal.

SCOPE

2. This policy applies to all posts within the scope of the National Joint Council Green Book terms and conditions for Local Government Services. The policy sets out the procedure to be followed to initiate a Job Evaluation for the purposes of re-evaluating an existing job or to grade a new job. It also describes the JE appeals process.
3. Posts within the scope of the Joint Negotiating Committee (JNC) for Chief Officers and Craft and Associated Employees (Red Book terms and conditions) are not covered by this policy.

PRINCIPLES

4. Job Evaluation is a process that seeks to objectively measure the different elements or parts of a job using information provided by managers such as job descriptions and person specifications. Each element will be analysed systematically to give an overall score for the job role. All jobs are scored in the same way, giving a comparison of jobs across the organisation.
5. In using the NJC Scheme, the council is demonstrating its commitment to operating staffing structures which are free from discrimination. Furthermore, the council is committed to challenging pay inequalities and ensuring equal pay for work of equal value for all employees.
6. The grading of a post is determined by the level of responsibility contained within the role. It is not determined by the volume of work undertaken.
7. It is a managers responsibility to ensure employees are not consistently asked to undertake responsibilities beyond those appropriate to their grade and must continually review roles to ensure the job description matches the role actually performed. This should be undertaken for any vacancy or at least every 3 years.

8. The council encourages employees to grow and develop in their careers and skillsets and the JE process should not restrict development. Opportunities to develop may come through undertaking tasks at a higher level than would normally be expected of a job role. These opportunities should be carefully managed to ensure that the duties do not become established within the job role as this could have an impact to the existing job evaluation for the post. Employees who undertake higher level duties as part of ongoing self-development should acknowledge that these duties are carried out voluntarily and recorded in the PDR and will not be considered grounds for a re-evaluation of the job role.
9. Managers will have an awareness of the impact of a change of grade to their establishment and budget. Managers should ensure they have adequate budget to action any changes which may result from the job evaluation process.
10. This policy is issued by way of guidance on the council's policy and practice. It does not form part of an employee's contract of employment or otherwise have any contractual effect.

CRITERIA FOR JOB EVALUATION

11. A request for a Job Evaluation would be appropriate under the following circumstances:
 - a. A job holder can justify that there have been significant permanent changes to their duties and responsibilities since the original evaluation was undertaken
 - b. Management identify planned changes to an existing post which requires a re-evaluation
 - c. A new post is created which requires grading
12. Any job holders dissatisfied with the result of the evaluation will have the right to appeal the decision using the Job Evaluation Appeal Procedure provided they can demonstrate an error or omission in the evaluation process.

SECTION 2: PROCEDURE JOB HOLDER REQUEST FOR RE-EVALUATION

13. Duties and responsibilities of posts vary from time to time without changing the general nature of the duties or the level of responsibility. Such variations are a common occurrence and would not justify re-evaluation.
14. Job holders may request a re-evaluation where they consider their job role has changed significantly and that these changes are permanent e.g. significant changes in budgetary, line management or service responsibility. Job holders

must be able to evidence additional responsibilities rather than additional tasks by submitting the job holder request for a re-evaluation form at Appendix A to HR. The date of receipt of appendix A by HR will be the effective date of any change to the grade of the role.

15. The line manager should comment on the evidence provided by the employee using the form at appendix B and submit to HR within 2 weeks of receipt. In addition the line manager should complete the Job Evaluation approval and monitoring form (appendix C).
16. The manager will meet with the job holder(s) to discuss the evidence provided in appendix A and appendix B. Also present will be a representative from HR and the job holder(s) can be supported by a work colleague or trade union representative. They should discuss the evidence and identify any differences and agree any amendments.
16. An updated job description and person specification should be produced during the meeting with comments from both parties. The line manager should discuss with their Assistant Director the potential budgetary implications.
17. The manager will submit the relevant documents to HR detailed at paragraph 32 within 2 weeks of the meeting with the postholder(s).
18. The Assistant Director must then submit a report to vacancy control panel outlining the potential additional costs of the regrade and measures to be taken within the service area to meet the costs within existing budget. This may require restructures, reduction in the number of posts or removal of the additional duties giving rise to the request for the regrade.
19. Paragraphs 17 and 19 do not preclude an employee from requesting a re-evaluation.

MANAGER REQUEST FOR RE-EVALUATION

20. Managers are responsible for developing new roles and maintaining existing job descriptions and person specifications following changes to posts.
21. In cases where there has been a substantial change which clearly impacts on one or more of the evaluation factors then re-evaluation will be considered.
22. Where the manager has evidence that a post has changed significantly, they should initially consult with and gain formal written approval from their Assistant Director about re-evaluating the post. This approval should be gained using the Job Evaluation approval and monitoring form (appendix C).

23. The Assistant Director must then submit a report to vacancy control panel outlining the potential additional costs of the regrade and measures to be taken within the service area to meet the costs within existing budget. This may require restructures, reduction in the number of posts or removal of the additional duties giving rise to the request for the regrade.
24. Where agreement is reached that the job requires a re-evaluation the manager will update the job description and person specification before consulting with Human Resources in order to ensure that the job description and person specification meet the council's corporate objectives and competencies.

MANAGER REQUEST FOR NEW POST

25. Managers are responsible for developing new roles and the associated job descriptions and person specifications.
26. Where the manager requires a new job role to be evaluated, they should initially consult with and gain formal written approval from their Assistant Director. If this relates to a full service restructure, approval must be sought through normal channels eg cabinet and employment and general.
27. Where creation of a new post does not form part of a full service restructure the Assistant Director must then submit a business justification for the new post to vacancy control panel outlining the additional costs of the regrade and measures to be taken within the service area to meet the costs within existing budget. This may require restructures or reduction in the number of posts.
28. Where agreement is reached that the new job role requires evaluation, the manager will ensure that the job description and person specification meet the council's corporate objectives and competencies before submitting to Human Resources with the completed Job Evaluation approval and monitoring form (appendix C).

JOB EVALUATION OUTCOMES

29. There are three possible outcomes of a re-evaluation of a post. Post holder(s) and managers should take this into consideration before making any request for re-evaluation of a job role, they are:
 - a. The re-evaluation of one or more factor levels results in a change to the overall job evaluation total score which places the post in a different pay grade. The new grade can be higher or lower than the existing grade.

- b. The re-evaluation of one or more factor levels results in a change to the overall job evaluation total score which is not sufficient to change the pay grade for the post.
- c. There is no change to the job evaluation total score (although there may be changes to factor levels which offset one another) and therefore no resultant change of pay band.

CRITERIA FOR RE-EVALUATION

30. The council will only consider a request for a job evaluation if the following criteria are met:
- a. The Assistant Director is aware of the job evaluation request and submitted a report to VCP.
 - b. It must not be within twelve months of any previous request or appeal. (unless the job has changed significantly since the previous evaluation)
 - c. A job holder must have been employed in the post for twelve months or more before a request for re-evaluation can be made. (unless the job has changed significantly since the previous evaluation)
 - d. All required documentation must be completed in full and provided to HR.

PROCESS FOR JOB EVALUATION - GAUGE

32. If all the above criteria are met, the following documents should be completed and returned to Human Resources.
- a. An original job description and person specification for the post if available.
 - b. A revised job description and person specification to evidence the new or changed post requirements. These revisions should be made in tracked changes wherever possible.
 - c. An organisation structure chart to evidence any changes to the hierarchy.
 - d. Details of equivalent roles to compare to where appropriate.
 - e. Completed Job Evaluation approval and monitoring form. (appendix C)
33. An interview with a HR Job Analyst and the manager will take place within 2 weeks of receipt of all the documents listed at paragraph 32 above. The purpose of the interview will be to process the up to date job description and person specification via the computerised Gauge job evaluation system.

34. At the end of the interview the Job Overview and Question Trace will be provided to the manager to establish whether all the duties and responsibilities have been captured.
35. The results from the Gauge job evaluation system and the indicative grade will be provided to the manager.

JOB EVALUATION PANEL

36. A job evaluation panel will be convened following completion of the interview via the Gauge job evaluation system. This meeting will take place within two weeks of the Gauge interview.
31. The panel will consist of one suitably trained and experienced member of the HR team and one suitably trained and experienced representative from a recognised trade union.
32. The panel will jointly consider the information gathered during the Gauge interview against the job description, person specification and all other supporting documents provided.
33. The panel will agree the appropriate level for each of the 13 factors within the NJC job evaluation scheme and review against similar job roles before determining the grade for the post.
34. A summary of the 13 job evaluation factors can be found at appendix D.
35. The results from the panel will be moderated for organisational consistency by a separate suitably trained and experienced member of the HR team. Any issues or requests for clarification will be presented to the panel before final confirmation of the evaluated grade.

GRADE APPROVAL AND NOTIFICATION

36. Once the job evaluation has been undertaken and the score and grade for the post have been determined, confirmation of the result will be sent to the manager in writing.
37. Where there has been a change in the grade of the evaluated post, the manager should first consult with their Assistant Director for approval to implement the amended grade.
38. Where there has been an increase in the grade and budget pressures

would not enable implementation the Assistant Director should meet with the employee to explain the process and discuss a reduction in responsibilities.

39. The Job Evaluation approval and monitoring form (appendix C) should be completed and returned to Human Resources.
40. Human Resources will confirm the outcome of the job evaluation panel to the post holder(s) in writing following receipt of the completed Job Evaluation approval and monitoring form (appendix C).
41. If there is an increase of more than one grade the manager will convene a meeting with the post holder(s) to ensure suitability for the role.
42. The post holder(s) will be given 10 working days following receipt of the job evaluation decision to appeal the outcome of the re-evaluated factors using the Job Evaluation Appeals Procedure.

JOB EVALUATION APPEAL PROCEDURE

43. Any job holder dissatisfied with the result of the evaluation will have the right to appeal to HR regarding the decision using the Job Evaluation Appeal Procedure provided they can demonstrate an error or omission in the evaluation process.
51. Employees must register their intention to appeal against the grading of their post in writing no later than 10 working days following receipt of the job evaluation decision.
52. In submitting an appeal the holder(s) must set out the grounds for the appeal. These grounds must evidence any incorrect application of the scheme and identify which factors they are appealing against and set out their reasons using the 13 factors at appendix D as a guide.
53. As a first step, the appeal should be discussed informally with the post holder(s), their representative and the line manager as soon as possible. A trained HR Job Analyst should also be present.
54. If the appeal is not settled and/or withdrawn, the application must be submitted to HR for submission to a joint panel. The panel will consist of one suitably trained and experienced member of the HR team and one suitably trained and experienced representative from a recognised trade union, neither of whom have been previously involved with the previous decision/ process.

55. The decision of the Job Evaluation Appeals Panel will be final and there will be no further right of appeal either internally or externally. This does not preclude a subsequent application for a re-evaluation for increased duties and responsibilities after a period of 12 months.

CHESTERFIELD BOROUGH COUNCIL**JOB HOLDER REQUEST FOR RE-EVALUATION****SECTION 1: EMPLOYEE TO COMPLETE**

NAME:		JOB TITLE:	
START DATE IN THIS POST:		LINE MANAGER:	
DEPARTMENT:		DATE OF CLAIM:	
CURRENT BAND:			

SECTION 2: EMPLOYEE TO COMPLETE

Where an employee considers that their job role has changed significantly in terms of responsibility and that the changes are permanent eg significant changes in budgetary, line management or service responsibility they must evidence additional responsibilities, rather than additional tasks below. The current job description can be used to identify additional responsibilities which are not already covered.

The 13 factors of the Job Evaluation scheme can be used to identify where the employee feels their post is not correctly evaluated. The 13 factors are knowledge; mental skills; interpersonal and communication skills; physical skills; initiative and independence; physical demands; mental demands; emotional demands; responsibility for people; supervision; financial resources; physical resources and working conditions (see appendix D of the Job Evaluation policy for further details)

CONTINUE ON A SEPARATE SHEET IF REQUIRED

SIGNED:

DATE:

Please return this completed form to HR by post or email: HRqueries@chesterfield.gov.uk

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CHESTERFIELD BOROUGH COUNCIL**LINE MANAGER COMMENTS ON RE-EVALUATION****SECTION 1: LINE MANAGER TO COMPLETE**

Comment on the evidence provided in appendix A Job Holder request for re-evaluation. Clarify if the employee's job role has changed significantly in terms of responsibility and that the changes are permanent eg significant changes in budgetary, line management or service responsibility. Confirm if there is evidence of additional responsibilities rather than additional tasks and if they are covered by the current job description.

CONTINUE ON A SEPARATE SHEET IF REQUIRED

SIGNED:

DATE:

Please return this completed form to HR within 2 weeks of receipt by post or email:
HRqueries@chesterfield.gov.uk

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JOB EVALUATION APPROVAL AND MONITORING FORM

BACKGROUND INFORMATION (Please complete all sections)					
Manager's Name:		Department/ Section:			
Post Title:		Number of affected posts:		Current Grade:	Band
REASON FOR JOB EVALUATION REQUEST (Please tick which applies)					
<input type="checkbox"/>	Option 1: Job holder request				
<input type="checkbox"/>	Option 2: Manager request				
<input type="checkbox"/>	Option 3: New post				
Manager's signature Manager's Name Date					
REQUEST FOR JOB EVALUATION (Please tick to confirm that the following actions have taken place before submitting all paperwork to HR)					
<input type="checkbox"/>	Line manager has advised Assistant Director on changes and potential budgetary implications				
<input type="checkbox"/>	Assistant Director has submitted a report to VCP				
AD Signature AD Name Date					
<input type="checkbox"/>	Proposals have been discussed with HR and an amended job description and person specification have been agreed				
HRBP Signature HRBP Name Date					
GRADE APPROVAL AND IMPLEMENTATION (Please tick to confirm that the following actions have taken place before confirming any changes to employees)					
<input type="checkbox"/>	The Job Evaluation Panel outcome has been discussed with you taking into account budget pressures and approval has been granted to implement any changes or you will meet the employee to explain the process and discuss a reduction in responsibilities				
AD Signature AD Name Date					
Please return this form to HR to ensure the Job Evaluation process is completed					

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FEATURES OF THE LOCAL GOVERNMENT JOB EVALUATION SCHEME

The NJC Job Evaluation Scheme consists of “a “factor plan,” “a scoring system” and “weightings” free from gender bias and discrimination on the grounds of race, sexuality, religion, race and disability. The scheme has 13 factors which are split into 4 groups as follows:

Group 1: Knowledge and skills

1. Knowledge.
2. Mental skills.
3. Interpersonal and Communication skills.
4. Physical skills.

Group 2: Effort Demands

5. Initiative and Independence.
6. Physical Demands.
7. Mental Demands.
8. Emotional Demands.

Group 3: Responsibilities

9. Responsibility for people.
10. Responsibility for Supervision/Direction/Co- Ordination of Employees .
11. Responsibility for Financial Resources.
12. Responsibility for Physical Resources.

Group 4: Environmental Demands

13. Working Conditions.

The factors are explained in more detail below. During the evaluation interview, the Gauge evaluation system will determine an appropriate score for each of the factors and then an overall score for each job role.

FACTOR GUIDANCE

The information below provides further details regarding each of the 13 factors which will be assessed during the job evaluation.

Group 1: Knowledge and Skills

1. Knowledge

This factor measures the knowledge required to do the job. It covers all technical, specialist, procedural and organisational knowledge required for the job, including numeracy and literacy; knowledge of equipment and machinery; and knowledge of concepts, ideas, other cultures or languages, theories, techniques, policies, procedures and practices.

It takes into account the breadth, diversity and range of knowledge and the depth and complexity of the understanding required. When completing the process, the following areas will be considered:

- Procedures/practice
- Single/multiple tasks
- Operation of equipment, plant and machinery
- The training needed for the job and how it is acquired
- What professional qualifications are required
- Knowledge of other service areas within the council

2. *Mental Skills*

This factor measures the mental skills required for the job. It includes analytical, problem solving and judgmental skills. It also includes creative and developmental skills, whether related to design, handling of people or development of policies and procedures; and planning and strategic skills. It takes into account requirements to gather, collate and analyse the facts needed to solve problems; and also requirements for imaginative thinking. When completing the process, the following areas will be considered:

- Problem solving
- Creativity
- Analytical skills
- The need to exercise judgment or decision making
- Information handling
- Developing plans or strategies

3. *Interpersonal and Communication Skills*

This factor measures the interpersonal and communication skills required for the job. It includes oral, linguistic sign and written communication skills. The emphasis of the factor is on the purpose to which the interpersonal and communication skills are put (for example, training, promoting, obtaining information from others, interviewing, gaining the co-operation of others, team working, advising, motivating, persuading, counselling, conciliating, negotiating, meeting the needs of others).

The factor covers the complexity or contentiousness of the subject matter to be conveyed, and any requirements to exercise confidentiality or sensitivity. It takes into account the nature, diversity, cultural background and size of the intended audiences. When completing the process, the following areas will be considered:

- Contact with clients/customers
- Caring or training skills
- The needs of clients/customers for whom responsible
- Training/development/motivational skills
- Handling of information
- Communication skills – written and oral

4. *Physical Skills*

This factor measures the physical skills required for the job. It covers manual and finger dexterity, hand-eye co-ordination, co-ordination of limbs, and

sensory coordination. It takes into account the purpose to which the skills are put and demands arising from the need to achieve specified standards of speed and precision. When completing the process, the following areas will be considered:

- Hand-eye co-ordination
- Manual dexterity
- Typing, driving, operating equipment
- The level of precision and speed
- Level of expertise required.

Group 2: Effort Demands

5. Initiative and Independence

This factor measures the scope allowed to the jobholder to exercise initiative and take independent actions. It takes into account the nature and level of supervision of the jobholder; the level and degree of direction and guidance provided by policies, precedents, procedures and regulations; and any requirements to organise or quality check own work. When completing the process, the following areas will be considered:

- The extent of instructions/guidance and the level of detail available
- How workloads and priorities are organised
- The levels of discretion in decision making including unexpected problems/situations
- The accessibility of colleagues and managers for consultation/advice

6. Physical Demands

This factor measures the type, amount, continuity and frequency of the physical effort required by the Job. It covers stamina as well as strength. It takes into account all forms of bodily effort, for example, that required for standing and walking, lifting and carrying, pulling and pushing. It also includes the physical demands involved in working in awkward positions, for example, bending, crouching, stretching; for sitting, standing or working in a constrained position; and for maintaining the required pace of work. When completing the process, the following areas will be considered:

- Working in awkward/constrained positions
- Lifting/carrying
- Pushing/pulling
- Standing/walking
- Rubbing/scrubbing/digging
- The time spent on each activity per day
- The level of demand this activity puts on the individual – is it considerable, high or very high?

7. Mental Demands

This factor measures the degree and frequency of the mental concentration, alertness and attention required by the job. It takes into account features that may make concentration more difficult, for example, repetitive work,

interruptions or the need to switch between varied tasks or activities; and other forms of work related pressure, for instance, arising from conflicting work demands. It also takes into account the responsiveness required of the jobholder. When completing the process, the following areas will be considered:

- The level of mental attention (both visually and by listening) required for the job, including the length and frequency
- Working under pressure and to deadlines
- Frequency of working under pressure and to deadlines
- Prioritization and organisation of work, especially conflicting work-related demands
- Interruptions which make attention or concentration difficult.

8. *Emotional Demands*

This factor measures the nature and frequency of the emotional demands on the jobholder arising from contact with people the council provides a service to. This factor does not include contact with colleagues and other members of staff.

Emotional demands occur when the people with whom the job holder has contact cause the employee to feel distressed. For example whether customers are angry, difficult, upset or unwell; or whether their circumstances are such as to cause stress to the jobholder, for example, if the people concerned are terminally ill, very frail, at risk of abuse, homeless or disadvantaged in some other way.

This factor does not include verbal abuse; this is covered under working conditions. When completing the process, the following areas will be considered:

- Emotional stress from the circumstances or behaviour or people
- The category of people causing stress
- The level and frequency of stress.

Group 3: Responsibility Factors

For each of the four responsibility factors, the job holder's direct responsibility for policy development and/or providing advice and guidance on the application of policy or external regulations/legislation will be assessed.

In all but a few exceptional situations, job holders will only be permitted to claim this type of responsibility under one of the four responsibility factors. It is important to identify prior to the interview the factor under which the job holder's MAIN or PRIMARY policy/advisory responsibility is most appropriately reflected and to answer the relevant questions within the factor, even if there is a secondary impact under another factor.

9. *Responsibility for People*

This factor measures the responsibility of the jobholder for the physical, mental, social, economic and environmental wellbeing of people or groups of

people for whom the council provides services (i.e. members of the public, service users and recipients, clients). This excludes other employees supervised or managed by the jobholder.

The emphasis of the factor is on the nature and extent of the direct impact on the wellbeing of individuals or groups. These responsibilities could be exercised through, for example, providing advice and guidance, implementing or enforcing regulations or developing and implementing services. When completing the process, the following areas will be considered:

- The impact of your decision making on customers
- Implementing and enforcing regulations
- Health and safety of customers

10. Responsibility for the supervision, direction and co-ordination of employees

This factor measures the direct responsibility of the jobholder for the supervision, co-ordination or management of employees, or others in an equivalent position. It includes work planning and allocation; checking and evaluating the work of others; and training, development and guidance.

It also includes responsibility for personnel functions for those for whom the jobholder has a formal supervisory responsibility, such as recruitment, discipline, appraisal; and planning, organising and long-term development of human resources.

The emphasis of the factor is on the nature of the responsibility, rather than the precise numbers of employees supervised, co-ordinated or managed. It takes into account the extent to which other employees contribute to the overall responsibility. When completing the process, the following areas will be considered:

- The supervision and management of employees
- The number of people the post holder is responsible for
- work planning and organisation
- checking and evaluating work
- training, development and guidance.

11. Responsibility for Financial Resources

This factor measures the direct responsibility of the jobholder for financial resources, including cash, vouchers, cheques, debits and credits, invoices, budgets and income. It takes into account the nature of the responsibility, for example, correctness and accuracy; safekeeping, confidentiality and security; deployment and degree of direct control; budgetary and business planning responsibilities; planning, organising and long term development of the financial resources. It also takes into account the degree to which other employees contribute to the overall responsibility and the value of the financial resources. When completing the process, the following areas will be considered:

- Personal and shared responsibility for income generation or expenditure budgets
- Setting or monitoring targets or budgets and their value
- Accounting for or handling expenditure or money

12. Responsibility for Physical Resources

This factor measures the direct responsibility of the jobholder for physical resources, including manual or computerised information; data and records; office and other equipment; tools and instruments; vehicles; plant and machinery; land, construction works, buildings and fittings and fixtures; personal possessions; and goods, produce stocks and supplies.

It takes into account the nature of the responsibility, for example, safekeeping, confidentiality and security; deployment and degree of direct control, maintenance and repair; ordering, purchasing and replacement authority; planning, organising and long term development of the physical resources.

It also takes into account the degree to which other employees contribute to the overall responsibility, the frequency with which the responsibility is exercised and the value of the physical resources. When completing the process, the following areas will be considered:

Information systems

- regular development or procurement of information systems
- Production or processing of manual or computer information
- The frequency and level of accuracy, care, confidentiality, security required in handling information
- responsibility for planning and implementing procurement of large scale systems

Equipment or tools

- personal responsibility for adaptation, design, development or procurement of equipment
- the range/value of equipment the post holder is responsible for
- responsibility for planning and implementing procurement and deployment of wide range of high value equipment

Buildings, premises, external locations

- the main nature of responsibility, eg cleaning, maintenance/repair, security, adaptation/development, design, procurement or disposal
- responsibility for planning and implementing procurement and or disposal of assets, supplies or stocks
- level of value and range of assets

Personal possessions of others

- the value of the possessions

Group 4: Environmental Demands

13. Working Conditions

This factor measures exposure to disagreeable, unpleasant, uncomfortable or hazardous working conditions arising from the environment or from work with people.

It covers the frequency, duration and nature of conditions, such as dust, dirt, temperature extremes and variations, humidity, noise, vibration, fumes and smells, human or animal waste, steam, smoke, grease or oil, inclement weather, lack of privacy or isolation, and the risk of illness or injury arising from exposure to diseases, toxic substances, machinery or work locations. It also covers abuse, aggression and risk of injury from people.

The factor measures those aspects of the working environment that are unavoidable and integral to the job. Health and safety regulations and requirements are assumed to be met but the requirement to wear protective clothing may create disagreeable or uncomfortable conditions. The emphasis of this factor is on the degree of unpleasantness or discomfort caused. This takes into account the frequency, intensity and duration of exposure to particular conditions; and the additional effect of variations or combinations of conditions. When completing the process, the following areas will be considered:

- Whether you need to work outdoors
- The percentage of time spent working outdoors of the working day or shift
- Exposure to weather
- Protective clothing required
- Level and frequency of exposure to verbal abuse, aggression or anti-social behaviour.

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Chesterfield Borough Council Equality Impact Assessment - Full Assessment Form

<i>Title of the policy, project, service, function or strategy:</i>	Job Evaluation Policy	
<i>Service Area:</i>	HR	
<i>Section:</i>	HR	
<i>Lead Officer:</i>	Kate Harley	
<i>Date of assessment:</i>	10/18	
<i>Is the policy, project, service, function or strategy:</i>		
<i>Existing</i>	<input type="checkbox"/>	
<i>Changed</i>	<input checked="" type="checkbox"/>	
<i>New / Proposed</i>	<input type="checkbox"/>	

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Section 1 – Clear aims and objectives

1. What is the aim of the policy, project, service, function or strategy?

This policy has been produced to provide guidance to employees and managers regarding the job evaluation of Chesterfield Borough Council job roles. The policy details the procedures required for the evaluation, re-evaluation and appeals against evaluations of posts. The purpose of the job evaluation scheme is to ensure that employees are paid fairly and consistently for similar roles across the organisation, ensuring equal pay for work of equal value for all employees.

The policy replaces the job evaluation arrangements within the existing Local Collective Agreement with the Trade Unions.

2. Who is intended to benefit from the policy and how?

Job Evaluation is a process that seeks to objectively measure the different elements or parts of a job using information provided by managers such as job descriptions and person specifications. Each element will be analysed systematically to give an overall score for the job role. All jobs are scored in the same way, giving a comparison of jobs across the organisation.

In using the National Joint Council (NJC) Scheme, the council is demonstrating its commitment to operating staffing structures which

are free from discrimination. Furthermore, the council is committed to challenging pay inequalities and ensuring equal pay for work of equal value for all employees.

With the above in mind, this policy is for the benefit of all employees within the council.

3. What outcomes do you want to achieve?

Enabling the Council to challenge pay inequalities and ensure equal pay for work of equal value for all employees, using a nationally prescribed scheme which provides a framework to prevent discrimination.

Section 2 – What is the impact?

4. Summary of anticipated impacts.

	Potentially positive impact	Potentially negative impact	No disproportionate impact
Age	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Disability and long term conditions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gender and gender reassignment	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Marriage and civil partnership	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pregnant women and people on parental leave	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sexual orientation	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ethnicity	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Religion and belief	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Section 3 – Recommendations and monitoring

If you have answered that the policy, project, service, function or strategy could potentially have a negative impact on any of the above characteristics then a full EIA will be required.

5. Should a full EIA be completed for this policy, project, service, function or strategy?

Yes No

Please explain the reasons for this decision:

The policy is not anticipated to have any disproportionate impact on protected groups. Furthermore, the Council's existing Pay Protection, Redeployment and Equality and Diversity Policies are in place for occasions where changes in roles and/or pay are necessary.

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Section 6 – Knowledge management and publication

Please note the draft EIA should be reviewed by the appropriate Service Manager and the Policy Service **before** WBR, Lead Member, Cabinet, Council reports are produced.

Reviewed by Head of Service/Service Manager	Name:	
	Date:	DD/MM/YY
Reviewed by Policy Service	Name:	K Marshall
	Date:	10/10/2018
Final version of the EIA sent to Policy Service	<input type="checkbox"/>	
Decision information sent to Policy Service	<input type="checkbox"/>	

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FOR PUBLICATION

TRAVEL AND SUBSISTENCE POLICY

MEETING: EMPLOYMENT AND GENERAL COMMITTEE
DATE: 27 January 2020
REPORT BY: SANDY GILLHAM-HARDY, HR BUSINESS PARTNER.

1.0 PURPOSE OF REPORT

To provide information regarding the new Travel and Subsistence policy, advise the committee on the HMRC requirement for VAT receipts and to recommend the policy for approval.

2.0 BACKGROUND

There has been limited guidance on travel and subsistence across the Council and a formal policy has been requested to fill this gap.

The Council is able to recover an amount in respect of VAT included in the fuel element of the mileage charge which is calculated using HMRC Advisory Fuel Rates. It is therefore important that VAT is correctly recorded on claim forms and that VAT receipts are provided in order to ensure that the Council recovers the full amount of VAT to which it is entitled. This is now covered in the policy.

Union colleagues have been consulted on the content of the policy and compromises have been reached throughout.

3.0 PROPOSED PROCEDURE

The aim of the policy is to provide guidelines on the Council's policy relating to travel, subsistence and expenses. It aims to provide clear guidance to enable Council activity whilst complying with the relevant financial and legal regulations and reporting obligations which are required to be introduced at the earliest opportunity due to the recovery of VAT.

It is acknowledged that the Council have declared a climate emergency and that a working group will be established to tackle the effects of climate change. As a key priority for the Council this policy recognises the need to reduce the Council's carbon footprint by:

- Reducing the need for employees to travel and promoting alternatives through agile working and better use of technology;

- Make better use of our core fleet vehicles and encourage the use of electric vehicles;
- Reduce the cost, financially and environmentally, of any travel done by promoting public transport, bicycles and car sharing for work journeys;
- Help employees to travel more sustainably and cheaper to and from work.

The climate change action plan will review this policy in due course and the policy can be amended to take account of any recommendations from the climate change emergency to reduce its use of carbon and protect the environment eg alternative methods including telephone, e-mail, telephone or video conferencing and incentives for using a bicycle rather than a car.

Reasonable adjustments will be provided as appropriate to enable employees with disabilities to carry out their duties and have the same (or as similar as possible) opportunities as a non-disabled person.

The revised policy can be found at appendix A.

A full Equality Impact Assessment has been completed and is attached for information at appendix B.

4.0 EMPLOYER – TRADE UNION COMMITTEE

The proposed policy was submitted to the Employer trade union Committee on 23 October 2019 and was endorsed for submission to Employment and General Committee subject to UNISON receiving legal advice on the policy, which has been obtained and no further changes were made to the policy.

5.0 RECOMMENDATION

That the new Travel and Subsistence Policy be approved.

For further information on this report, contact Sandy Gillham-Hardy.

TRAVEL & SUBSISTENCE POLICY

Prepared by: Human Resources

Approved by Employment and General Committee: XX 2019

For review: XX 2022

Version 4 13/12/19

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SECTION 1: GENERAL GUIDING PRINCIPLES

POLICY STATEMENT

1. This policy outlines the Council's policy relating to travel, subsistence and expenses. It aims to provide clear guidance to enable Council activity whilst complying with the relevant financial and legal regulations.
2. Employees have a responsibility to ensure that the cost to the Council is kept to a minimum, co-ordinating travel, where possible, to keep the number of separate car journeys to a minimum and considering alternative and sustainable ways to travel.
3. When paying employees' travel costs the Council has certain tax, National Insurance and reporting obligations. This includes costs for travel, subsistence, parking charges, tolls, congestion charges or business phone calls.
4. This policy recognises the need to reduce the Council's carbon footprint through the climate change emergency action plan by:
 - Reducing the need for employees to travel and promoting alternatives through agile working and better use of technology;
 - Make better use of our core fleet vehicles and encourage the use of electric vehicles;
 - Reduce the cost, financially and environmentally, of any travel done by promoting public transport, bicycles and car sharing for work journeys;
 - Help employees to travel more sustainably and cheaper to and from work.
5. This policy has been developed to support the environment and only essential business travel should be undertaken. Where possible, alternative methods should be considered including telephone, e-mail and if available, telephone or video conferencing.
6. Reasonable adjustments will be provided as appropriate to enable employees with disabilities to carry out their duties and have the same (or as similar as possible) opportunities as a non-disabled person.

SCOPE

7. This policy applies to all employees of Chesterfield Borough Council including employees attending college/ further education establishments.
8. This policy applies to all claims for travel and subsistence expenditure by Chesterfield Borough Council employees regardless of the method of payment.

PRINCIPLES

9. Employees should exercise sensible judgement in determining the most cost effective or most practical means of carrying out essential journeys whilst also considering environmental factors. This includes car-sharing, using public transport and seeking alternatives to travel eg conference calls.
10. Employees are expected to behave with honesty and integrity with specific regards to making any claim for travel expenses and subsistence expenses.
11. Employees must only submit claims for their own travel expenses and payment will only be made for journeys actually undertaken. Abuse of travel allowances will be dealt with under the disciplinary procedure.
12. Only costs relating to Council activities will be reimbursed.
13. Payment of authorised travel expenses will be made by BACS transfer into the same bank account as an employee's salary with the next available salary pay date on receipt of an authorised and complete mileage claim submitted to the Payroll department in line with the Payroll Processing Timetable (available on aspire).
14. If an employee uses their own car for official journeys, they must ensure that their motor insurance policy covers them for 'business use' and indemnifies the Council (as employer) against third party claims or policy excess charges. (The whole of an employee's motor insurance cover would be invalidated if using the vehicle on Council business when only covered for social and domestic purposes.)
15. Employees should inform their manager immediately if their licence is revoked whether due to ill health, receipt of penalty points or prosecution.
16. Employees using their cars on official business must also be in possession of a current full valid driving licence for the vehicle they are driving and ensure that the vehicle is in a roadworthy condition prior to the commencement of

and during the journey. Where required the vehicle should have a current MOT certificate.

17. On an annual basis, the employee will be required to produce their current driving licence, motor insurance policy, and evidence of their MOT for their manager to check and confirm validity. A record should be kept by the manager that these checks have been carried out.
18. Fixed penalty parking fines, etc, are the sole responsibility of the employee.
19. If expenditure is outside of this Policy (please refer to Appendix A), or considered unreasonable, approval will need to be sought from the relevant Assistant Director for a final decision. A tax charge may arise that will need to be paid by either the individual or the Council, dependent on the circumstances.
20. If an employee is unsure whether expenditure will comply with the policy they should contact their line manager to discuss it before making any journeys or claims.
21. The Council is not responsible for the cost incurred in travelling from home to work, except for excess travel where an employee has been relocated, or for journeys which take place outside contracted working hours.
22. No advance travel or subsistence payments will be made. All payments are based on journeys actually undertaken and the employee having incurred expenditure.
23. Payments for any travel or subsistence expenses should not be made from petty cash.
24. This policy is issued by way of guidance on the council's policy and practice. It does not form part of an employee's contract of employment or otherwise have any contractual effect.

SECTION 2: PROCEDURE

VAT

25. The Council is able to recover an amount in respect of VAT included in the fuel element of the mileage charge which is calculated using HMRC Advisory Fuel Rates. It is therefore important that VAT is correctly recorded on claim

forms and that VAT receipts are provided in order to ensure that the Council recovers the full amount of VAT to which it is entitled.

26. A VAT receipt for fuel must accompany all claims for mileage and attached to the back of the form, a credit card receipt is not acceptable. This receipt must be dated prior to the date of the mileage claim. The receipt must show it was for fuel, have the date of supply (tax point), name and address of the seller, the seller's VAT registration number and total price paid. Receipts must be for sufficient fuel to cover all the miles claimed, for example:

- Petrol - 12p for every mile (100 miles claim equates to £12)
- Diesel - 9p for every mile (100 miles claim equates to £9)
- LPG - 8p for every mile (100 miles claim equates to £8)

The above examples are based on the HMRC Advisory Fuel Rates which were in force for the period from 1 December 2019. The latest HMRC Advisory Fuel Rates can be found at:-

<https://www.gov.uk/government/publications/advisory-fuel-rates/advisory-fuel-rates-from-1-march-2016>

27. Any claim after 1 XX 20XX (the start date of this policy) not accompanied by a fuel VAT receipt will be returned to the employee to attach a valid receipt with the exception of electric cars which are currently not covered by HMRC Advisory Fuel Rates.

MILEAGE ALLOWANCE PAYMENTS

28. The Council Mileage Allowance Payments (MAP's) are based on the HMRC rates. The rates are an approved amount which does not have to be reported to HMRC. These rates are the statutory maximum amounts that can be paid to employees for using their own vehicles for business purposes without having to pay tax and national insurance contributions. Please see Appendix A for the current MAP's.

SUBSISTENCE

29. Benchmark scale rates are the maximum amounts which can be paid to employees without agreeing a tailored scale rate with HMRC, the excess should be subject to tax and National insurance contributions. The benchmark scale rates for Council employees is attached at Appendix B.

30. Benchmark scale rates must only be used where all the qualifying conditions are met. The qualifying conditions are:

- The travel must be in the performance of an employee's duties
- The employee should be absent from their normal place of work or home for a continuous period in excess of 5 hours or 10 hours (see Appendix B)
- The employee should have incurred a cost for a meal (food and drink) after starting the journey
- The employee must be working outside of the Borough

31. Subsistence claims will not be paid where an employee is at their normal base, at a Council location with suitable facilities or within the Borough.

32. No allowances will be paid where a suitable meal has been provided.

33. All subsistence claims must have the original VAT receipt attached otherwise it will be returned to the employee.

BREAKFAST RATE

34. The breakfast rate may be paid where an employee leaves home earlier than usual and before 6am and incurs a cost for breakfast taken away from home after the qualifying journey has started. If an employee usually leaves before 6am the breakfast rate does not apply.

LATE EVENING MEAL RATE

35. The late evening meal rate may be paid where the employee has to work later than usual, finishes work after 8pm having worked their normal day and has to buy a meal before the qualifying journey ends which they would usually have at home.

36. The breakfast and late evening meal rates are for use in exceptional circumstances only and are not intended for employees with regular early or late work patterns. Employees should seek permission from their line manager prior to claiming any subsistence rate.

ONE MEAL (5-hour) RATE

37. The rate may be paid where the employee has been undertaking qualifying travel for a period of at least 5 hours and has incurred the cost of a meal.

TWO MEAL (10-hour) RATE

38. The rate may be paid where the employee has been undertaking qualifying travel for a period of at least 10 hours and has incurred the cost of a meal or meals.
39. Benchmark scale rate payments must be limited to 3 meal rates on one day or 24-hour period. A meal is defined as a combination of food and non-alcoholic drink.

OVERNIGHT SUBSISTENCE RATE

40. If an employee needs to stay overnight and intends to claim expenses they will need to get approval in advance from their line manager.
41. HMRC have not set a benchmark rate for overnight subsistence. The employee should obtain at least 2 quotes for the cost of an overnight stay and agree in advance with their line manager which amount is payable based on best value for money and suitability.
42. A VAT receipt must be attached to claim the actual cost of overnight accommodation as approved in advance by the line manager.
43. An employee can only be reimbursed for a meal once. If the cost of an evening meal or breakfast is reimbursed on an actual basis, because it is included in the cost of an overnight stay, the employee would not also be entitled to the benchmark rate for breakfast or late evening meal.

INCIDENTAL EXPENSES

44. Incidental expenses can be claimed by an employee if they meet the qualifying criteria. Incidental expenses cover telephone calls, laundry etc.
45. A qualifying period is a continuous period throughout which an employee has to stay away from home, including at least one overnight stay away from home, and where the expense of travelling qualifies for tax relief under the normal rules.
46. A VAT receipt is not required to claim incidental expenses.

PUBLIC TRANSPORT

47. Travel undertaken by public transport can be reclaimed through actual bus or second class rail fares at the cheapest available rate upon production of the receipt as expenses. Where employees are required to use rail travel,

only standard class fares will be permitted. First class rail may only be claimed in special circumstances and with prior approval from an Assistant Director.

MAKING A CLAIM

48. Full details of the journey, including date, reason for journey, starting points and destinations, should be shown on a monthly travel claim form which can be found on aspire. Business miles to be claimed must be entered and the amount claimed shown in the appropriate columns and accompanied by valid VAT receipt.
49. Any reasonable parking fees etc, incurred during the journey will be reimbursed. A valid VAT receipt should be attached to any claim.
50. Where a journey is undertaken directly from home to a place of duty without going to the normal place of work (base) the lesser than principle in Appendix C should apply.
51. Claims should be submitted to the employee's line manager in line with the claim period end dates as detailed within the Payroll Processing Timetable available on Aspire. Claims should be submitted at the earliest opportunity and no later than 3 months after the period end date when the mileage and expense has been incurred.
52. In any event, all claims must be submitted within the tax and financial year that it relates to where possible.
53. Claims submitted after the 3 month period deadline will only be paid following a satisfactory written explanation from the relevant Assistant Director and the relevant Finance Manager.
54. All official travel is subject to the approval from the employee's manager.
55. The Council reserve the right to withhold any payment where the claim has been submitted late and written approval from an Assistant Director and Finance Manager has not been provided.

APPROVING A CLAIM

56. Approval of a travel claim by the manager shall be taken to mean that:

- The journeys were necessary and authorised;
- Consideration has been given to value for money and environmental impact in choosing the mode of transport;
- Relevant VAT receipts are attached;
- The employee's documents have been checked and are valid
- The calculations are correct.

57. The line manager should approve claims in a timely manner to ensure payment is received at the next available opportunity.

58. Managers should review on an annual basis the number of business miles travelled by employees.

KEEPING RECORDS

59. Any supporting documentation will be retained by the Council for at least six years to meet the requirements of HMRC for VAT purposes.

60. Employees must retain their own records for tax purposes which provides details of the amount, nature and dates of the items incurred. Records must be kept for 3 years from the end of the tax year they relate to.

61. With respect to mileage claims, HMRC advise that the most important things which employees should keep are P11D details of expenses and benefits in kind, details of claims for expenses made and receipts which supported those claims, including for fuel (unless these are held by the employer) and records made themselves, such as mileage details where a car is used for business journeys.

APPENDIX A

MILEAGE ALLOWANCE PAYMENTS (MAP's)

The following MAP's are the approved HMRC rates for 2019/2020:

	First 10,000 business miles in the tax year	Each business mile over 10,000 in the tax year
Car	45p	25p
Motorcycle	24p	24p
Cycle	20p	20p
Passenger in a car	5p per passenger	5p per passenger

APPENDIX B

SUBSISTENCE PAYMENTS: TABLE OF BENCHMARK SCALE RATES

The HMRC benchmark scale rates that apply from April 2019 are as follows.

Description	Amount (up to)
Breakfast rate	£5
One meal (5 hour) rate	£5
Two meal (10 hour) rate	£10
Late evening meal rate	£15
Incidental expenses	£5 per night

DRAFT

APPENDIX C

LESSER THAN PRINCIPLE

Travel from and return to home

Where an employee travels directly from home to a place of duty and returns home directly without going to the normal place of work, the mileage to be claimed is the lower of home to duty to home **or** base to duty to base.

For example:

Home is Alfreton, base is Town Hall, duty is Mill Lane, Wingerworth

Alfreton to Town Hall is 12 miles

Town Hall to Wingerworth is 3.5 miles

Alfreton to Wingerworth is 8 miles

Therefore, home to duty to home, ie Alfreton to Wingerworth to Alfreton is 16 miles, whereas base to duty to base, ie Town Hall to Wingerworth to Town Hall is 7 miles.

The lesser value of 7 miles can be claimed.

Travel on route to or from work

If an employee travels directly from home to a place of duty and then to the work base, the mileage to be claimed is the lower of home to duty to base **or** base to duty to base.

The same principle applies where a journey is made from base to a place of duty and then directly to home.

For example:

Home is Alfreton, base is Town Hall, duty is Mill Lane, Wingerworth

Alfreton to Town Hall is 12 miles

Town Hall to Wingerworth is 3.5 miles

Alfreton to Wingerworth is 8 miles

Therefore, home to duty to base, ie Alfreton to Wingerworth to Town Hall is 11.5 miles whereas base to duty to base, ie Town Hall to Wingerworth to Town Hall is 7 miles.

The lesser value of 7 miles can be claimed.

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Chesterfield Borough Council Equality Impact Assessment - Full Assessment Form

<i>Title of the policy, project, service, function or strategy:</i>		TRAVEL & SUBSISTENCE POLICY
<i>Service Area:</i>	CCC	
<i>Section:</i>	HR	
<i>Lead Officer:</i>	SANDY GILLHAM-HARDY	
<i>Date of assessment:</i>	09/19	
<i>Is the policy, project, service, function or strategy:</i>		
<i>Existing</i>	<input type="checkbox"/>	
<i>Changed</i>	<input checked="" type="checkbox"/>	
<i>New / Proposed</i>		

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Section 1 – Clear aims and objectives

1. What is the aim of the policy, project, service, function or strategy?

This policy outlines the Council's approach relating to travel, subsistence and expenses.

2. Who is intended to benefit from the policy and how?

The purpose of this policy is to provide clear guidance to enable Council activity whilst complying with the relevant financial and legal regulations.

3. What outcomes do you want to achieve?

Employees have a responsibility to ensure that the cost to the Council is kept to a minimum, co-ordinating travel, where possible, to keep the number of separate car journeys to a minimum and considering alternative and sustainable ways to travel.

The policy recognises the need to reduce the Council's carbon footprint by reducing the need for employees to travel and

promoting alternatives through agile working and better use of technology, make better use of our core fleet vehicles and encourage the use of electric vehicles, reduce the cost, financially and environmentally, of any travel done by promoting public transport, bicycles and car sharing for work journeys and help employees to travel more sustainably and cheaper to and from work.

4. What barriers exist for both the Council and the groups/people with protected characteristics to enable these outcomes to be achieved?

When paying employees' travel costs the Council has certain tax, National Insurance and reporting obligations. This includes costs for travel, subsistence, parking charges, tolls, congestion charges or business phone calls.

5. Any other relevant background information

The previous policy and guidelines were out of date and needed revising.

Section 2 – Collecting your information

6. What existing data sources do you have to assess the impact of the policy, project, service, function or strategy?

- Payment data from finance
- Current subsistence policy and travel guidance

Section 3 – Additional engagement activities

7. Please list any additional engagement activities undertaken when developing the proposal and completing this EIA. Have those who are anticipated to be affected by the policy been consulted with?

Date	Activity	Main findings
------	----------	---------------

19/08/19	Policy drafted by HRBP	Updated with HMRC guidelines
22/08/19	Meeting with audit, payroll and finance	VAT and payroll wording to be tightened
30/08/19	Meeting with HR Manager	Discuss and agree amendments to policy
30/08/19	Consultation with recognised trade unions	Discuss and agree amendments to policy
30/08/19	Consultation with CMT	Discuss and agree amendments to policy

Section 4 – What is the impact?

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8. Summary of anticipated impacts. <i>Please tick at least one option per protected characteristic. Think about barriers people may experience in accessing services, how the policy is likely to affect the promotion of equality, knowledge of customer experiences to date. You may need to think about sub-groups within categories eg. older people, younger people, people with hearing impairment etc.</i>			
	Positive impact	Negative impact	No disproportionate impact
Age			✓ <input type="checkbox"/>
Disability and long term conditions		✓	<input type="checkbox"/>
Gender and gender reassignment	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Marriage and civil partnership	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pregnant women and people on parental leave	<input type="checkbox"/>		✓ <input type="checkbox"/>
Sexual orientation	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ethnicity	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Religion and belief	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

9. Details of anticipated positive impacts.							
a)	<i>The policy should clarify that all staff will be dealt with the same in the same manner if they have an overpayment.</i>						
	<input type="checkbox"/> Age	<input type="checkbox"/> Disability	<input type="checkbox"/> Gender	<input type="checkbox"/> Marriage	<input type="checkbox"/> Pregnancy	<input type="checkbox"/> Sexual orientation	<input type="checkbox"/> Ethnicity <input type="checkbox"/> Religion
b)							

	<input type="checkbox"/> Age	<input type="checkbox"/> Disability	<input type="checkbox"/> Gender	<input type="checkbox"/> Marriage	<input type="checkbox"/> Pregnancy	<input type="checkbox"/> Sexual orientation	<input type="checkbox"/> Ethnicity	<input type="checkbox"/> Religion
c)								
	<input type="checkbox"/> Age	<input type="checkbox"/> Disability	<input type="checkbox"/> Gender	<input type="checkbox"/> Marriage	<input type="checkbox"/> Pregnancy	<input type="checkbox"/> Sexual orientation	<input type="checkbox"/> Ethnicity	<input type="checkbox"/> Religion

10. Details of anticipated <u>negative</u> impacts.								
a)	<i>Negative impact:</i>	Employees with a disability or long term condition may not have a driving licence or access to a car.						
	<i>Mitigating action:</i>	<p>The policy encourages employees to reduce the cost, financially and environmentally, of any travel done by promoting public transport, bicycles and car sharing for work journeys.</p> <p>The policy has been developed to support the environment and stipulates only essential business travel should be undertaken. Where possible, alternative methods should be considered including telephone, e-mail and if available, telephone or video conferencing. Reasonable adjustments will be provided as appropriate to enable employees with disabilities to carry out their duties and have the same (or as similar as possible) opportunities as a non-disabled person.</p>						
	<input type="checkbox"/> Age	<input checked="" type="checkbox"/> Disability	<input type="checkbox"/> Gender	<input type="checkbox"/> Marriage	<input type="checkbox"/> Pregnancy	<input type="checkbox"/> Sexual orientation	<input type="checkbox"/> Ethnicity	<input type="checkbox"/> Religion
b)	<i>Negative impact:</i>							
	<i>Mitigating action:</i>							
	<input type="checkbox"/> Age	<input type="checkbox"/> Disability	<input type="checkbox"/> Gender	<input type="checkbox"/> Marriage	<input type="checkbox"/> Pregnancy	<input type="checkbox"/> Sexual orientation	<input type="checkbox"/> Ethnicity	<input type="checkbox"/> Religion
c)	<i>Negative impact:</i>	.						

	<i>Mitigating action:</i> .						
	<input type="checkbox"/> Age	<input type="checkbox"/> Disability	<input type="checkbox"/> Gender	<input type="checkbox"/> Marriage	<input type="checkbox"/> Pregnancy	<input type="checkbox"/> Sexual orientation	<input type="checkbox"/> Ethnicity

11. Have all negative impacts identified in the table above been mitigated against with appropriate action?			
<input checked="" type="checkbox"/> xYes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	<i>If no, please explain why:</i>

Section 5 – Recommendations and monitoring

12. How has the EIA helped to shape the policy, project, service, function or strategy or affected the recommendation or decision?

This EIA has highlighted issues around employees who may not have a driving licence or access to a car and actions have been put in place in the policy to mitigate these.

13. How are you going to monitor the policy, project, service, function or strategy, how often and who will be responsible?

The implementation of the policy will be carefully monitored by HR on an ongoing basis and will be reviewed after three years.

Section 6 – Knowledge management and publication

Please note the draft EIA should be reviewed by the appropriate Service Manager and the Policy Service **before** WBR, Lead Member, Cabinet, Council reports are produced.

Reviewed by Head of Service/Service Manager	Name:	Kate Harley
	Date:	02/09/19
Reviewed by Policy Service	Name:	Katy Marshall
	Date:	03/09/19
Final version of the EIA sent to Policy Service	<input type="checkbox"/>	
Decision information sent to Policy Service	<input type="checkbox"/>	

For Publication

Calculation of Tax Base 2020/21

Meeting: Employment & General Committee

Date: 27 January 2020

Report by: Acting Chief Finance Officer

For publication

1.0 Purpose of report

1.1 To approve the Tax Base calculation for 2020/21.

2.0 Background

2.1 The Local Authorities (Calculation of Tax Base) Regulations 1992 (as amended) require the Borough Council as Billing authority to calculate the Tax Base for the Borough and the Parishes and to notify the Major Precepting Authorities (Derbyshire County Council and Derbyshire Police Authority), and those Parishes which request it, by 31st January each year.

2.2 Section 84 of the Local Government Act 2003 amended the tax setting regulations so that the tax base calculation no longer has to be approved by the full council. The calculation of the tax base is a procedural matter which, should be delegated to a non-executive committee. The Council agreed (17th December 2003) to delegate the function to the Employment and General Committee.

2.3 The tax base represents the estimated full year equivalent number of chargeable dwellings in an area, expressed as the equivalent number of Band D dwellings. Or more simply, it is an estimate of how much income a Council Tax of £1 would raise.

3.0 **Calculation of the Tax base**

3.1 The regulations mentioned at paragraph 2.1 prescribe the method of calculating the Tax Base and the statements at Appendices A, B, C and D show the Council's Tax Base calculation for the Whole Area, Chesterfield's non-parished areas, Staveley Town Council and Brimington Parish Council respectively.

3.2 The estimated collection rate was reduced in 2013/14 to 98.1% to reflect the increased difficulty of collecting small amounts from people affected by the changes to the council tax scheme. A review of collection rates has shown that this difficulty has decreased over time and it is now considered appropriate to work on the basis of a collection rate of 98.25%.

3.3 The overall Tax Base for 2020/21 at **29,181.08** (Appendix A) shows an increase of 180.45 or 0.6% on the 2019/20 Tax Base of 29,000.63.

3.4 The Tax Base for each of the parished areas is as follows:

- ◆ Staveley **4,215.27** – an increase of 78.87 or 1.9% on last year's tax base of 4,136.40 (Appendix C); &
- ◆ Brimington **2,322.81** – a decrease of 7.78 or 0.3% on last year's tax base of 2,330.59 (Appendix D).

4.0 **Legal and data protection implications**

4.1 The tax base must be set between the 1st December and 31st January.

5.0 Alternative options

5.1 None.

6.0 Recommendations

6.1 That the report for the calculation of the Council's Tax Base for the whole and parts of the area for 2020/21 be approved.

6.2 That pursuant to the report and in accordance with Local Authorities (Calculation of Tax Base) Regulations 1992 (as amended), the amount calculated by Chesterfield Borough Council as its Tax Base for the year 2020/21 shall be:

Table – 2020/21 TAX BASE (Equivalent Number of Band 'D' Dwellings)

	2019 /20	2020/ 21	Increase / (Decrease)	
			N o.	%
Chesterfield (whole area)	29,000.63	29,181.08	184.5	0.6
Staveley Town Council	4,136.40	4,215.27	78.7	1.9
Brimington Parish Council	2,330.59	2,322.81	(7.78)	(0.3)

7.0 Reasons for recommendations

7.1 To fulfil a statutory requirement and to enable the Council Tax to be set later in the financial year.

Document information

Report author	Contact number/email
Helen Fox	01246 345452 helen.fox@chesterfield.gov.uk
Background documents	
These are unpublished works which have been relied on to a material extent when the report was prepared.	
<i>This must be made available to the public for up to 4 years.</i>	
Appendices to the report	
Appendix A	2020/21 Council Tax Base – Whole Area
Appendix B	2020/21 Council Tax Base – Chesterfield
Appendix C	2020/21 Council Tax Base – Staveley Town Council
Appendix D	2020/21 Council Tax Base – Brimington Parish Council

2020/2021 COUNCIL TAX BASE - WHOLE AREA

BAND	A (Disabled)	A	B	C	D	E	F	G	H	TOTAL
Number of Dwellings	0.00	26,675.00	10,249.00	6,211.00	3,780.00	1,912.00	544.00	219.00	22.00	49,612.00
Less Exempt/Demolished(classes B & D to W))	0.00	383.00	133.00	82.00	42.00	17.00	4.00	2.00	0.00	663.00
Less Council Tax Reduction scheme	11.50	5,513.52	762.43	243.56	69.10	24.92	4.27	0.00	0.00	6,629.30
Less Revised Exempt Class A & C discount (or 100% discount)	0.00	394.00	106.00	45.00	18.00	5.00	3.00	0.00	0.00	571.00
Less Disregards at 50% (including 50% for work related dwellings)	0.00	8.50	6.00	5.00	4.00	2.50	7.00	6.50	2.00	41.50
Less Single Person and Disregard Discounts at 25%	4.00	3,188.00	884.25	454.50	203.25	81.25	22.75	7.00	0.00	4,845.00
Plus Empty Homes Surcharge (50% addition)	0.00	52.00	14.00	5.00	1.00	1.00	0.50	1.00	0.00	74.50
Adjustment for Disabled Relief	56.00	-9.00	-2.00	-28.00	-3.00	-7.00	12.00	-9.00	-10.00	0.00
Adjustments for New Properties and anticipated changes in reliefs	0.00	51.40	52.45	46.05	70.35	17.45	5.90	0.50	0.00	244.10
Total for Band	40.50	17,282.38	8,421.77	5,403.99	3,512.00	1,792.78	521.38	196.00	10.00	37,180.80
Multiplier	5/9	6/9	7/9	8/9	9/9	11/9	13/9	15/9	18/9	-
Band D Equivalent	22.50	11,521.59	6,550.27	4,803.55	3,512.00	2,191.18	753.10	326.67	20.00	29,700.85
Tax Base 2020/21 (on the basis of a 98.25% Collection Rate)	22.11	11,319.96	6,435.64	4,719.48	3,450.54	2,152.83	739.93	320.95	19.65	29,181.08

2020/2021 COUNCIL TAX BASE - CHESTERFIELD

BAND	A (Disabled)	A	B	C	D	E	F	G	H	TOTAL
Number of Dwellings	0.00	18,476.00	8,402.00	4,916.00	3,205.00	1,771.00	517.00	202.00	15.00	37,504.00
Less Exempt/Demolished(classes B & D to W))	0.00	281.00	114.00	65.00	38.00	15.00	4.00	1.00	0.00	518.00
Less Council Tax Reduction scheme	7.32	3,842.69	639.56	168.56	59.05	20.97	3.62	0.00	0.00	4,741.77
Less Revised Exempt Class A & C discount (on 100% discount)	0.00	288.00	93.00	39.00	18.00	5.00	3.00	0.00	0.00	446.00
Less Disregards at 50% (including 50% for work related dwellings)	0.00	6.00	3.50	4.50	1.50	0.50	4.50	3.00	2.00	25.50
Less Single Person and Disregard Discounts at 25%	2.75	2,348.25	738.25	365.75	179.00	76.50	21.50	6.75	0.00	3,738.75
Plus Empty Homes Surcharge (50% addition)	0.00	35.00	11.50	4.00	0.50	0.00	0.50	1.00	0.00	52.50
Adjustment for Disabled Relief	33.00	8.00	-16.00	-12.00	-1.00	-7.00	9.00	-9.00	-5.00	0.00
Adjustments for New Properties and anticipated changes in reliefs	0.00	47.75	37.65	21.75	55.95	12.55	5.90	0.50	0.00	182.05
Total for Band	22.93	11,800.81	6,846.84	4,286.94	2,964.90	1,658.58	495.78	183.75	8.00	28,268.53
Multiplier	5/9	6/9	7/9	8/9	9/9	11/9	13/9	15/9	18/9	-
Band D Equivalent	12.73	7,867.21	5,325.32	3,810.62	2,964.90	2,027.16	716.13	306.25	16.00	23,046.31
Tax Base 2020/21 (on the basis of a 98.25% Collection Rate)	12.52	7,729.53	5,232.13	3,743.92	2,913.01	1,991.68	703.59	300.89	15.72	22,643.00

2020/2021 COUNCIL TAX BASE - STAVELEY TOWN COUNCIL

BAND	A (Disabled)	A	B	C	D	E	F	G	H	TOTAL
Number of Dwellings	0.00	5,683.00	1,075.00	782.00	324.00	76.00	23.00	11.00	4.00	7,978.00
Less Exempt/Demolished(classes B & D to W))	0.00	64.00	9.00	9.00	2.00	2.00	0.00	1.00	0.00	87.00
Less Council Tax Reduction scheme	4.18	1,244.28	71.83	49.55	5.13	3.03	0.65	0.00	0.00	1,378.65
Less Revised Exempt Class A & C discount (98.100% discount)	0.00	60.00	10.00	3.00	0.00	0.00	0.00	0.00	0.00	73.00
Less Disregards at 50% (including 50% for work related dwellings)	0.00	1.50	1.50	0.00	0.50	1.00	0.50	1.00	0.00	6.00
Less Single person and Disregard Discounts at 25%	0.75	558.00	85.50	51.50	11.00	3.25	0.75	0.25	0.00	711.00
Plus Empty Homes Surcharge (50% addition)	0.00	13.00	1.00	0.50	0.50	1.00	0.00	0.00	0.00	16.00
Adjustment for Disabled Relief	17.00	-15.00	7.00	-7.00	0.00	0.00	-1.00	1.00	-2.00	0.00
Adjustments for New Properties and anticipated changes in reliefs	0.00	3.65	12.80	24.30	14.40	1.90	0.00	0.00	0.00	57.05
Total for Band	12.07	3,756.87	917.97	686.75	320.27	69.62	20.10	9.75	2.00	5,795.40
Multiplier	5/9	6/9	7/9	8/9	9/9	11/9	13/9	15/9	18/9	-
Band D Equivalent	6.71	2,504.58	713.98	610.44	320.27	85.09	29.03	16.25	4.00	4,290.35
Tax Base 2020/21 (on the basis of a 98.25% Collection Rate)	6.59	2,460.75	701.48	599.76	314.67	83.60	28.53	15.97	3.93	4,215.27

2020/2021 COUNCIL TAX BASE - BRIMINGTON PARISH COUNCIL

BAND	A (Disabled)	A	B	C	D	E	F	G	H	TOTAL
Number of Dwellings	0.00	2,516.00	772.00	513.00	251.00	65.00	4.00	6.00	3.00	4,130.00
Less Exempt/Demolished(classes B & D to W))	0.00	38.00	10.00	8.00	2.00	0.00	0.00	0.00	0.00	58.00
Less Council Tax Reduction Scheme	0.00	426.55	51.04	25.45	4.92	0.92	0.00	0.00	0.00	508.88
Less Revised Exempt Class A & C discount (on 100% discount)	0.00	46.00	3.00	3.00	0.00	0.00	0.00	0.00	0.00	52.00
Less Disregards at 50% (including 50% for work related dwellings)	0.00	1.00	1.00	0.50	2.00	1.00	2.00	2.50	0.00	10.00
Less Single person and Disregard Discounts at 25%	0.50	281.75	60.50	37.25	13.25	1.50	0.50	0.00	0.00	395.25
Plus Empty Homes Surcharge (50% addition)	0.00	4.00	1.50	0.50	0.00	0.00	0.00	0.00	0.00	6.00
Adjustment for Disabled Relief	6.00	-2.00	7.00	-9.00	-2.00	0.00	4.00	-1.00	-3.00	0.00
Adjustments for New Properties and anticipated changes in reliefs	0.00	0.00	2.00	0.00	0.00	3.00	0.00	0.00	0.00	5.00
Total for Band	5.50	1,724.70	656.96	430.30	226.83	64.58	5.50	2.50	0.00	3,116.87
Multiplier	5/9	6/9	7/9	8/9	9/9	11/9	13/9	15/9	18/9	-
Band D Equivalent	3.06	1,149.80	510.97	382.49	226.83	78.93	7.94	4.17	0.00	2,364.19
Tax Base 2020/21 (on the basis of a 98.25% Collection Rate)	3.00	1,129.68	502.03	375.80	222.86	77.55	7.81	4.09	0.00	2,322.81

For Publication

Non-Domestic Rates Estimates for 2020/21

Meeting: Employment and General Committee

Date: 27 January 2020

Report by: Acting Chief Finance Officer

For publication

1.0 Purpose of Report

1.1 To approve the National Non-Domestic Rates (NNDR) estimates and NNDR1 Return for 2020/21.

2.0 Recommendations

2.1 That the estimated National Non Domestic Rates estimates as recorded on the NNDR1 Return (Appendix A) be approved.

2.2 That delegated authority be given to the Acting Chief Finance Officer to make any subsequent changes to the NNDR1 return that are identified before the final submission date of the 31st January 2020.

3.0 Background

3.1 The Local Authorities (Calculation of Business Rates 'Tax Base') Regulations 1992 (as amended) require the Borough Council as Billing authority to calculate the Tax Base for the Borough and the Parishes and to notify the Major Precepting Authorities (Derbyshire County Council and Derbyshire Fire Authority), and those Parishes which request it, by 31st January each year.

- 3.2 Section 84 of the Local Government Act 2003 amended the tax setting regulations so that the business rates tax base calculation no longer has to be approved by the full Council. The calculation of the tax base is a procedural matter which, should be delegated to a non-executive committee. The Council agreed (17th December 2003) to delegate the function to the Employment and General Committee.
- 3.3 With the introduction of the Business Rates Retention Scheme from April 2013 there is now a requirement for the Council to formally approve the Business Rates Tax Base. The approval process must be the same as that used for the approval of the Council Tax Base. The estimate of the Business Rates base and yield is included in a return to the Government known as the NNDR1 return. The NNDR1 return shows how the estimated yield is to be distributed, including the amount to be retained by the Council.

4.0 NNDR Income Estimates

- 4.1 The Local Government Finance Act introduced the part-retention of income from Business Rates from April 2013. The income generated is currently shared between the Government (50%), the County Council (9%), the Fire Authority (1%) and the Borough Council (40%)
- 4.2 The draft Local Government Finance Settlement published in December 2019 set the Council's tariff at £11,465,704 and the baseline funding level at £3,373,521 for 2020/21. The Council will receive Revenue Support Grant of £441,530 in 2020/21.
- 4.3 The Council must complete and approve a form, known as the NNDR1 Return, which shows how the estimated income has been calculated and how it is to be shared. The form must then be sent to those entitled to a share of the income by 31st January 2020.

- 4.4 The copy of the NNDR1 return for approval is included as Appendix A. Appendix A is based on the best available information at this point in time but may have to be revised if further changes are required after this meeting but prior to submission on 31st January 2020.
- 4.5 Parts of the NNDR1 form are based on factual data at a given point in time but officers have been required to make their own estimates about future events such as new buildings, demolitions and the outcome of appeals, both new and outstanding. The amount to be retained and paid over to those entitled to a share of the income will be fixed at the start of the year based on the estimate on the NNDR1 return so it is important that the income forecast is not overstated.
- 4.6 The NNDR1 return (Appendix A) shows that the estimated net rate yield is £37.8m (Part 1B, Line 15) and that this will be shared as follows:

Paid to:	Income Part 1B Line 15 £000's	Fund Surplus Part 1B Line 28 £000's	Income Share 2019/20 %
Central Government	18,904	488	50%
Retained by CBC	15,124	391	40%
Derbyshire County Council	3,403	88	9%
Derbyshire Fire Authority	378	10	1%
Total	37,809	977	100%

4.9 The amount the General Fund retains in relation to business rates is detailed below: -

	£000's
Council's retained share	15,124
Tariff paid to Central Government	(11,466)
Levy paid to the Derbyshire Pool	(1,102)
Grant Income Received (Part 1C Line 39)	2,604
Levy and Tariffs adjustment	(459)
Retained Business Rates - Renewable Energy	52
Retained Business Rates	4,753

4.10 In addition, for budget purposes it has been assumed that the financial benefit from the Derbyshire Pool will be £300k.

4.11 Collection Fund Surplus/Deficit

Billing Authorities are required to calculate the estimated surplus or deficit on the NNDR element of the Collection Fund each year.

The estimated surplus or deficit must be allocated to the organisations in the same proportions as income and the major preceptors should then take this surplus/ (deficit) into account when calculating their Council Taxes for the following financial year.

The NNDR element of the Collection Fund is estimated to be a surplus of £977k by the 31st March 2020. The table in para. 4.5 shows how the estimated surplus will be shared, with the Council receiving £391k.

5.0 Legal Implications

5.1 Paragraph 43 Schedule B of the Local Government Finance Act 1988 requires the Council to formally approve details of the provisional contributions for NNDR each year using the statutory NNDR1 form by 31st January. The form has been completed in accordance with the relevant regulations.

6.0 Risk Management

6.1 The key risks associated with the setting of the tax bases are summarised in the table below:

Description of risk	Current Risk Rating Impact / Likelihood	Mitigating Actions
Business rate income under/over estimated	High / Likely	Prudent assumptions are built into income forecast. The income will be monitored during the year.

7.0 Recommendations

7.1 That the estimated National Non Domestic Rates estimates as recorded on the NNDR1 Return (Appendix A) be approved.

7.2 That delegated authority be given to the Acting Chief Finance Officer to make any subsequent changes to the NNDR1 return that are identified before the final submission date of the 31st January 2020.

8.0 Alternative Options to be Considered

8.1 None

9.0 Reasons for Recommendation

9.1 To fulfil the statutory requirements to approve the estimated Business Rates income. The information is required by the Government and by the Council and the other precepting authorities to enable them to set their Council Taxes.

Document information

Report author	Contact number/email
Richard Staniforth	01246 345456 richard.staniforth@chesterfield.gov.uk
Background documents These are unpublished works which have been relied on to a material extent when the report was prepared.	
Appendices to the report	
Appendix A	NNDR1 Return



NATIONAL NON-DOMESTIC RATES RETURN
NNDR1 2020-21

Please e-mail to : ndr.statistics@communities.gov.uk

Please enter your details after checking that you have selected the correct authority name

Forms should be returned to the Ministry of Housing, Communities and Local Government by **Friday 31 January 2020**

All figures should be entered in whole £

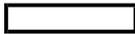
Please remember that a copy of this form, signed by your Chief Financial Officer / Section 151 officer should also be sent to your relevant Precepting Authorities, and Pool Leads (if applicable).

These instructions highlight the special features of the form and should be **read in conjunction with the Guidance Notes and Validation notes.**

Completing the form

1. The form can be set up for each individual local authority by selecting the appropriate authority name from the list. The example shows the local authority ZZZZ. Once a local authority name is selected the spreadsheet will automatically complete the data for the white cells with a blue border.

2. There are three different type of input cells:



* White, Black Border - these are blank for new data - Please ensure **all** white cells are filled before submitting the form including entering zeroes where appropriate.



* White background, green border - These cells are information cells and have the appropriate formula in them. **Please do not overwrite the formula.**



* White background, blue border - actual data entered by the Ministry of Housing, Communities and Local Government into these cells.

The **Total column** is greened out - there is no need to enter data in any of these cells.

In addition areas of the form are **greyed out** - especially for those authorities that do not have designated areas. **Please do not enter data** in these areas as this will cause delay as we will have to ask you to complete a revised form.

Entering data

3. **All** values in the form should be entered in whole £. Except for part 1 of the form, **receipts** (eg sums due to the billing authority from ratepayers, or central government) should always be entered as **positive numbers**. **Payments from the authority, or amounts foregone** (eg reliefs given to ratepayers) should always be entered as **negative numbers**.

4. Where possible, you will be prevented from entering data with the wrong sign (+ve when it should be -ve or vice versa).

Updates

We will use this area to list any updates to the form in the future if required

Checking the Validation Sheet

5. Once the form has been completed go to the validation sheet and check if any of the data require any further explanation. The data are compared with the NNDR1 for 2019-20 and, if the change in number or percentage terms is higher or lower than we would normally expect, you are asked to provide an explanation for the change in the box provided.

For further details on the types of checks we do see *Validation notes for NNDR1 2020-21*.

Signing the Form

6. When the data have been checked and verified please email the complete file to ndr.statistics@communities.gov.uk

7. Print a copy of the form for signing by your Chief Financial / Section 151 Officer. The form can be printed by using the defined print area.

The signed copy must be forwarded as a pdf document by email to the Ministry of Housing, Communities and Local Government using the email address above. NB We require just one copy of a signed form.

8. A copy of the form must also be sent to your NNDR contact at all your major precepting authorities.

9. If you experience any problems using the form please email ndr.statistics@communities.gov.uk

NATIONAL NON-DOMESTIC RATES RETURN - NDR1**2020-21**

Please e-mail to: nldr.statistics@communities.gov.uk by no later than 31 January 2020.
 In addition, a certified copy of the form should be returned by no later than **31 January 2020** to the same email address

All figures must be entered in whole £

If you are content with your answers please return this form to MHCLG as soon as possible

Select your local authority's name from this list:

Doncaster
Donwell
Donshire East UK
Donshire West and Chester UK
Donshire*
Doncaster

Authority Name
 E-code
 Local authority contact name
 Local authority contact number
 Local authority e-mail address

Chesterfield
E1033
Mrs Carolyn Szadura
01246 345495
carolyn.szadura@chesterfield.gov.uk

Ver 1.1

**PART 1A: NON-DOMESTIC RATING INCOME
 COLLECTIBLE RATES**

	£
1. Net amount receivable from rate payers after taking account of transitional adjustments, empty property rate, mandatory and discretionary reliefs and accounting adjustments	40,083,984
TRANSITIONAL PROTECTION PAYMENTS	
2. Sums due to the authority	0
3. Sums due from the authority	140,465
COST OF COLLECTION (See Note A)	
4. Cost of collection formula	162,600
5. Legal costs	0
6. Allowance for cost of collection	162,600
SPECIAL AUTHORITY DEDUCTIONS	
7. City of London Offset : Not applicable for your authority	0
DISREGARDED AMOUNTS	
8. Amounts retained in respect of Designated Areas	1,919,832
9. Amounts retained in respect of Renewable Energy Schemes (see Note B)	52,395
<i>of which:</i>	
10. sums retained by billing authority	52,395
11. sums retained by major precepting authority	0
12. Amounts retained in respect of Shale Oil and Gas Sites Schemes (see Note C)	0
NON-DOMESTIC RATING INCOME	
13. Line 1 plus line 2, minus lines 3, 6 - 9 and 12	37,808,692

NATIONAL NON-DOMESTIC RATES RETURN - NDR1
2020-21

Please e-mail to: ndr.statistics@communities.gov.uk by no later than 31 January 2020.
In addition, a certified copy of the form should be returned by no later than **31 January 2020** to the same email address

All figures must be entered in whole £

If you are content with your answers please return this form to MHCLG as soon as possible

Local Authority : Chesterfield

Ver 1.1

PART 1B: PAYMENTS

This page is for information only; please do not amend any of the figures

The payments to be made, during the course of **2020-21** to:

- i) the Secretary of State in accordance with Regulation 4 of the Non-Domestic Rating (Rates Retention) Regulations 2013;
- ii) major precepting authorities in accordance with Regulations 5, 6 and 7; and to be
- iii) transferred by the billing authority from its Collection Fund to its General Fund,

are set out below

	Column 1 Central Government	Column 2 Chesterfield	Column 3 Derbyshire County Council	Column 4 Derbyshire Fire Authority	Column 5 Total
Retained NDR shares	£	£	£	£	£
14. % of non-domestic rating income to be allocated to each authority in 2020-21	50%	40%	9%	1%	100%
Non-Domestic Rating Income for 2020-21					
15. Non-domestic rating income from rates retention scheme	18,904,346	15,123,477	3,402,782	378,087	37,808,692
16. (less) deductions from central share	0	0	0	0	0
17 TOTAL:	18,904,346	15,123,477	3,402,782	378,087	37,808,692
Other Income for 2020-21					
18. add: cost of collection allowance		162,600			162,600
19. add: amounts retained in respect of Designated Areas		1,919,832			1,919,832
20. add: amounts retained in respect of renewable energy schemes		52,395	0		52,395
21. add: amounts retained in respect of Shale oil and gas sites schemes		0	0	0	0
22. add: qualifying relief in Designated Areas		0	0	0	0
23. add: City of London Offset		0			0
24. add: additional growth retained in Additional Growth Pilots		0	0	0	0
25. add: in respect of Port of Bristol hereditament		0			0
Estimated Surplus/Deficit on Collection Fund	£	£	£	£	£
<u>Percentages to be used to distribute the collection fund surplus deficit</u>					
26. % for distribution of "in-year" surplus/deficit (ie 2019-20)	50%	40%	9%	1%	100%
26a. "In-year" surplus (positive) /deficit (negative)	242,464	193,971	43,644	4,849	484,928
27. % for distribution of "prior-year" surplus/deficit (ie 2018-19)	0%	50%	49%	1%	100%
27a. "Prior-year" surplus (positive) / deficit (negative)	0	246,114	241,191	4,922	492,227
28. Estimated Surplus/Deficit at end of 2019-20	488,577	390,862	87,944	9,772	977,155
TOTAL FOR THE YEAR	£	£	£	£	£
29. Total amount due to authorities	19,392,923	17,649,166	3,490,726	387,859	40,920,674

NATIONAL NON-DOMESTIC RATES RETURN - NDR1

2020-21

Please e-mail to: ndr.statistics@communities.gov.uk by no later than 31 January 2020.
In addition, a certified copy of the form should be returned by no later than **31 January 2020** to the same email address

All figures must be entered in whole £

If you are content with your answers please return this form to MHCLG as soon as possible

Local Authority : Chesterfield

Ver 1.1

PART 1C: SECTION 31 GRANT (See Note D)

This page is for information only; please do not amend any of the figures

Estimated sums due from Government via Section 31 grant, to compensate authorities for the cost of changes to the business rates system announced in the 2013 to 2016 Autumn Statements and 2017 (March and November), 2018 (October) Budgets

	Column 2 Chesterfield	Column 3 Derbyshire County Council	Column 4 Derbyshire Fire Authority	Column 5 Total
	£	£	£	£
Multiplier Cap				
30. Cost of cap on 2014-15, 2015-16 and post-2018-19 small business rates multipliers	685,199	136,384	15,154	836,737
Small Business Rate Relief				
31. Cost of doubling SBRR & threshold changes for 2020-21	1,379,890	310,475	34,497	1,724,862
31a. Additional compensation for loss of supplementary multiplier income	92,712	20,860	2,318	115,890
32. Cost to authorities of maintaining relief on "first" property	2,262	509	57	2,828
Rural Rate Relief				
33. Cost to authorities of providing 100% rural rate relief	1,236	278	31	1,545
Supporting Small Businesses Relief				
34. Cost to authorities of providing relief	5,612	1,263	140	7,015
Discretionary Scheme				
35. Cost to authorities of providing relief	3,720	837	93	4,650
Designated Areas qualifying relief in 100% pilot areas				
36. Cost to authorities of providing relief	0	0	0	0
Telecoms Relief				
37. Cost to authorities of providing relief	0	0	0	0
Retail discount				
38. Cost to authorities of providing relief	433,658	97,573	10,841	542,072
TOTAL FOR THE YEAR				
39. Amount of Section 31 grant due to authorities to compensate for reliefs	2,604,289	568,179	63,131	3,235,599

NB To determine the amount of S31 grant due to it, the authority will have to add / deduct from the amount shown in line 39, a sum to reflect the adjustment to tariffs / top-ups in respect of the multiplier cap (See notes for Line 39)

Certificate of Chief Financial Officer / Section 151 Officer

NDR1 2020-21

I confirm that the entries in this form are the best I can make on the information available to me and amounts are calculated in accordance with regulations made under Schedule 7B to the Local Government Act 1988. I also confirm that the authority has acted diligently in relation to the collection of non-domestic rates.

Name of Chief Financial Officer
or Section 151 Officer :

Signature :

Date :

NATIONAL NON-DOMESTIC RATES RETURN - NNDR1
2020-21

All figures must be entered in whole £

If you are content with your answers please return this form to MHCLG as soon as possible

Ver 1.1

Local Authority : Chesterfield

PART 2: NET RATES PAYABLE

You should complete columns 1 & 2 only

	Column 1 BA Area (exc. Designated areas) Complete this column	Column 2 Designated areas Complete this column	Column 3 TOTAL (All BA Area) Do not complete this column
	£	£	£
GROSS RATES PAYABLE (All data should be entered as +ve unless specified otherwise) - see Note E			
1. Rateable Value at <input type="text" value="20/12/19"/>	<input type="text" value="99,049,931"/>	<input type="text" value="3,734,750"/>	<input type="text" value="102,784,681"/>
2. Small business rating multiplier for 2020-21 (pence) <input type="text" value="49.9"/>			
3. Gross rates 2020-21 (RV x multiplier)	<input type="text" value="49,425,916"/>	<input type="text" value="1,863,640"/>	
4. Estimated growth/decline in gross rates (+ = increase, - = decrease)	<input type="text" value="117,825"/>	<input type="text" value="7,485"/>	
5. Forecast gross rates payable in 2020-21	<input type="text" value="49,543,741"/>	<input type="text" value="1,871,125"/>	<input type="text" value="51,414,866"/>
TRANSITIONAL ARRANGEMENTS (See Note F)			
6. Revenue foregone because increases in rates have been deferred (Show as -ve)	<input type="text" value="-139,992"/>	<input type="text" value="0"/>	<input type="text" value="-139,992"/>
7. Additional income received because reductions in rates have been deferred (Show as +ve)	<input type="text" value="280,457"/>	<input type="text" value="0"/>	<input type="text" value="280,457"/>
8. Net cost of transitional arrangements	<input type="text" value="140,465"/>	<input type="text" value="0"/>	
9. Changes as a result of estimated growth / decline in cost of transitional arrangements (+ = decline, - = increase)	<input type="text" value="0"/>	<input type="text" value="0"/>	
10. Forecast net cost of transitional arrangements	<input type="text" value="140,465"/>	<input type="text" value="0"/>	<input type="text" value="140,465"/>
TRANSITIONAL PROTECTION PAYMENTS (See Note F(a))			
11. Sum due to/(from) authority	<input type="text" value="-140,465"/>	<input type="text" value="0"/>	<input type="text" value="-140,465"/>

NATIONAL NON-DOMESTIC RATES RETURN - NNDR1
2020-21

All figures must be entered in whole £

If you are content with your answers please return this form to MHCLG as soon as possible

Ver 1.1

Local Authority : Chesterfield

PART 2: NET RATES PAYABLE

You should complete columns 1 & 2 only

	Column 1 BA Area (exc. Designated areas)	Column 2 Designated areas	Column 3 TOTAL (All BA Area)
MANDATORY RELIEFS (See Note G) (All data should be entered as -ve unless specified otherwise)			
Small Business Rate Relief			
12. Forecast of relief to be provided in 2020-21	-4,883,066	0	-4,883,066
13. of which: relief on existing properties where a 2nd property is occupied	-5,439	0	-5,439
14. Additional yield from the small business supplement (Show as +ve)	836,409	48,512	884,921
15. Net cost of small business rate relief (line 12 + line 14)	-4,046,657	48,512	-3,998,145
Charitable occupation			
16. Forecast of relief to be provided in 2020-21	-2,200,645	0	-2,200,645
Community Amateur Sports Clubs (CASCs)			
17. Forecast of relief to be provided in 2020-21	-43,489	0	-43,489
Rural rate relief			
18. Forecast of relief to be provided in 2020-21	-2,970	0	-2,970
Telecoms Relief (see Note L)			
19. Forecast of relief to be provided in 2020-21	0	0	0

20. Forecast of mandatory reliefs to be provided in 2020-21 (Sum of lines 15 to 19)

-6,293,761

48,512

-6,245,250

21. Changes as a result of estimated growth/decline in mandatory relief (+ = decline, - = increase)

-17,959

195

-17,764

22. Total forecast mandatory reliefs to be provided in 2020-21

-6,311,720

48,707

-6,263,013

UNOCCUPIED PROPERTY (See Note H) (All data should be entered as -ve unless specified otherwise)

Partially occupied hereditaments

23. Forecast of 'relief' to be provided in 2020-21

0

0

0

Empty premises

24. Forecast of 'relief' to be provided in 2020-21

-1,803,870

0

-1,803,870

25. Forecast of unoccupied property 'relief' to be provided in 2020-21 (Line 23 + line 24)

-1,803,870

0

-1,803,870

26. Changes as a result of estimated growth/decline in unoccupied property 'relief' (+ = decline, - = increase)

-49,178

0

-49,178

27. Total forecast unoccupied property 'relief' to be provided in 2020-21

-1,853,048

0

-1,853,048

NATIONAL NON-DOMESTIC RATES RETURN - NNDR1
2020-21

All figures must be entered in whole £

If you are content with your answers please return this form to MHCLG as soon as possible

Ver 1.1

Local Authority : Chesterfield

PART 2: NET RATES PAYABLE

You should complete columns 1 & 2 only

	Column 1 BA Area (exc. Designated areas)	Column 2 Designated areas	Column 3 TOTAL (All BA Area)
DISCRETIONARY RELIEFS (See Note J) (All data should be entered as -ve unless specified otherwise)			
Charitable occupation			
28. Forecast of relief to be provided in 2020-21	-51,166	0	-51,166
Non-profit making bodies			
29. Forecast of relief to be provided in 2020-21	-51,838	0	-51,838
Community Amateur Sports Clubs (CASCs)			
30. Forecast of relief to be provided in 2020-21	-95	0	-95
Rural shops etc			
31. Forecast of relief to be provided in 2020-21	0	0	0
Small rural businesses			
32. Forecast of relief to be provided in 2020-21	0	0	0
Other ratepayers (refer to guidance for further details)			
33. Forecast of relief to be provided in 2020-21	0	0	0
	<i>of which:</i>	<i>of which:</i>	
34. Relief given to Case A hereditaments		0	
35. Relief given to Case B hereditaments	0		
36. Forecast of discretionary relief to be provided in 2020-21 (Sum of lines 28 to 33)	-103,099	0	
37. Changes as a result of estimated growth/decline in discretionary relief (+ = decline, - = increase)	-150	0	
38. Total forecast discretionary relief to be provided in 2020-21	-103,249	0	-103,249

NATIONAL NON-DOMESTIC RATES RETURN - NNDR1
2020-21

All figures must be entered in whole £

If you are content with your answers please return this form to MHCLG as soon as possible

Ver 1.1

Local Authority : Chesterfield

PART 2: NET RATES PAYABLE

You should complete columns 1 & 2 only

	Column 1 BA Area (exc. Designated areas)	Column 2 Designated areas	Column 3 TOTAL (All BA Area)
DISCRETIONARY RELIEFS FUNDED THROUGH SECTION 31 GRANT (See Note K) (All data should be entered as -ve unless specified otherwise)			
Rural Rate Relief			
39. Forecast of relief to be provided in 2020-21	-2,970	0	-2,970
Supporting Small Businesses Relief			
40. Forecast of relief to be provided in 2020-21	-13,490	0	-13,490
Discretionary Scheme			
41. Forecast of relief to be provided in 2020-21	-8,942	0	-8,942
Retail Discount			
42. Forecast of relief to be provided in 2020-21	-1,042,366	0	-1,042,366
43. Forecast of discretionary reliefs funded through S31 grant to be provided in 2020-21 (Sum of lines 39 to 42)	-1,067,768	0	-1,067,768
44. Changes as a result of estimated growth/decline in Section 31 discretionary relief (+ = decline, - = increase)	0	0	
45. Total forecast of discretionary reliefs funded through S31 grant to be provided in 2020-21	-1,067,768	0	-1,067,768
NET RATES PAYABLE			
46. Forecast of net rates payable by rate payers after taking account of transitional adjustments, unoccupied property relief, mandatory and discretionary reliefs	£ 40,348,421	£ 1,919,832	£ 42,268,253

Checked by Chief Financial / Section 151 Officer :

NATIONAL NON-DOMESTIC RATES RETURN - NNDR1
2020-21

All figures must be entered in whole £

If you are content with your answers please return this form to MHCLG as soon as possible

Ver 1.1

Local Authority : Chesterfield

PART 3: COLLECTABLE RATES AND DISREGARDED AMOUNTS

You should complete columns 1 & 2

	Column 1 BA Area (exc. Designated areas) Complete this column	Column 2 Designated Areas Complete 'Part 3 DA summary' to fill this column	Column 3 TOTAL (All BA Area) Do not complete this column
	£	£	£
NET RATES PAYABLE			
1. Sum payable by rate payers after taking account of transitional adjustments, empty property rate, mandatory and discretionary reliefs	40,348,421	1,919,832	42,268,253
(LESS) LOSSES			
2. Estimated bad debts in respect of 2020-21 rates payable	-403,484	0	-403,484
3. Estimated repayments in respect of 2020-21 rates payable	-1,780,785	0	-1,780,785
COLLECTABLE RATES			
4. Net Rates payable less losses	38,164,152	1,919,832	40,083,984
DISREGARDED AMOUNTS			
5. Renewable Energy	52,395	0	52,395
6. Shale oil and gas sites scheme (see Note C)	0	0	0
7. Transitional Protection Payment		0	
8. Baseline		0	
DISREGARDED AMOUNTS		1,919,832	1,919,832
9. Total Disregarded Amounts			
DESIGNATED AREAS IN 100% PILOT AREAS			
10. Designated Areas Qualifying Relief: Not applicable	0	0	0
DEDUCTIONS FROM CENTRAL SHARE			
11. Designated Areas Qualifying Relief	0	0	0
Additional Growth Pilot Areas			
12. Net Rates payable for Growth Baseline comparison: Not applicable	0		0
13. Growth Baseline : Not applicable	0		0
14. Additional Growth in 'Growth Pilot' Areas: Not Applicable	0		0
Port of Bristol			
15. In respect of Port of Bristol: Not applicable	0		0
DEDUCTIONS FROM CENTRAL SHARE			
16. Total Deductions	0	0	0

Checked by Chief Financial / Section 151 Officer :

NATIONAL NON-DOMESTIC RATES RETURN - NDR1
2020-21

All figures must be entered in whole £

If you are content with your answers please return this form to MHCLG as soon as possible

Ver 1.1

Local Authority : Chesterfield

PART 4: ESTIMATED COLLECTION FUND BALANCE

(Please refer to guidance notes for details about these cells.)

	£	£
OPENING BALANCE		
1. Opening Balance (From Collection Fund Statement)		-2,095,095
BUSINESS RATES CREDITS AND CHARGES		
2. Business rates credited and charged to the Collection Fund in 2019-20	41,191,048	
3. Sums written off in excess of the allowance for non-collection	0	
4. Changes to the allowance for non-collection	-413,585	
5. Amounts charged against the provision for alteration of lists and appeals following RV list changes	531,583	
6. Changes to the provision for alteration of lists and appeals	-1,920,959	
7. Total business rates credits and charges (Total lines 2 to 6)		39,388,087
OTHER RATES RETENTION SCHEME CREDITS		
8. Transitional protection payments received, or to be received in 2019-20	0	
9. Transfers/payments to the Collection Fund for end-year reconciliations	0	
10. Transfers/payments into the Collection Fund in 2019-20 in respect of a previous year's deficit	2,587,322	
11. Total Other Credits (Total lines 8 to 10)		2,587,322
OTHER RATES RETENTION SCHEME CHARGES		
12. Transitional protection payments made, or to be made, in 2019-20	-151,800	
13. Payments made, or to be made, to the Secretary of State in respect of the central share in 2019-20	-18,238,430	
14. Payments made, or to be made to, major precepting authorities in respect of business rates income in 2019-20	-3,647,687	
15. Transfers made, or to be made, to the billing authority's General Fund in respect of business rates income in 2019-20	-14,590,745	
16. Transfers made, or to be made, to the billing authority's General Fund; and payments made, or to be made, to a precepting authority in respect of disregarded amounts in 2019-20	-2,274,497	
17. Transfers/payments from the Collection Fund for end-year reconciliations	0	
18. Transfers/payments made from the Collection Fund in 2019-20 in respect of a previous year's surplus	0	
19. Total Other Charges (Total lines 12 to 18)		-38,903,159
ESTIMATED SURPLUS/(DEFICIT) ON COLLECTION FUND IN RESPECT OF FINANCIAL YEAR 2019-20 - Surplus (positive), Deficit (Negative)		
20. Opening balance plus total credits, less total charges (Total lines 1, 7, 11 & 19)		977,155

Checked by Chief Financial / Section 151 Officer : _____

SUPPLEMENTARY INFORMATION ON HEREDITAMENTS BEING GRANTED RELIEF FROM NATIONAL NON-DOMESTIC RATES AND THE AMOUNT OF RELIEF GRANTED

Please complete the following questions on hereditaments that were being granted relief from national non-domestic rates and the amount of relief granted

If you have any queries on completing the form please contact us with the subject heading '*NDR1 query*' by email to nndr.statistics@communities.gov.uk

The completed form must be returned to nndr.statistics@communities.gov.uk no later than 31 JANUARY 2020

Authority Name	Chesterfield
E-code	E1033
Contact name	Mrs Carolyn Szadura
Contact number	01246 345495
Contact e-mail	carolyn.szadura@chesterfield.gov.uk

Ver 1.1

PART 1 : NUMBERS OF HEREDITAMENTS THAT WERE BEING GRANTED RELIEF AS AT 31 DECEMBER 2019 *

Number of hereditaments that were being granted relief as at 31 December 2019*

MANDATORY RELIEF

a. Number of hereditaments that were being granted charitable relief as at 31 December 2019*	185
b. Number of hereditaments that were being granted Community Amateur Sports Clubs relief as at 31 December 2019*	5
c. Number of hereditaments that were being granted rural general stores, post offices, public houses, petrol filling stations and food shops relief as at 31 December 2019*	3
d. Number of hereditaments that were being granted telecoms relief as at 31 December 2019	0
e. Number of hereditaments that were being granted partly occupied premises relief as at 31 December 2019*	0
f. Number of hereditaments that were being granted empty property relief as at 31 December 2019* of which:	254
<i>i. those that are classed as "industrial property" above the exemption threshold</i>	13
<i>ii. those that have "listed building status"</i>	40
<i>iii. those that are "Community Amateur Sports Clubs"</i>	0
<i>iv. those that are "charities"</i>	0
<i>v. those where the hereditament is empty and not included in categories i to iv</i>	183
<i>vi. those that are classed as "non-industrial" above the exemption threshold</i>	18

DISCRETIONARY RELIEF

g. Number of hereditaments that were being granted charitable relief as at 31 December 2019*	44
h. Number of hereditaments that were being granted non-profit making bodies' relief as at 31 December 2019*	2
i. Number of hereditaments that were being granted Community Amateur Sports Clubs relief as at 31 December 2019*	2
j. Number of hereditaments that were being granted rural shops, post offices, public houses, petrol filling stations and food shops relief as at 31 December 2019*	0
k. Number of hereditaments that were being granted other small rural businesses relief as at 31 December 2019*	0
l. Number of hereditaments within Enterprise Zones being granted discounts as at 31 December 2019*	0
m. Number of hereditaments subject to a S47 local discount as at 31 December 2019*	0

RELIEF FUNDED THROUGH SECTION 31 GRANT

n. Number of hereditaments receiving Rural Rate Relief as at 31 December 2019	3
o. Number of hereditaments receiving Local Newspaper Relief as at 31 December 2019	0
p. Number of hereditaments receiving Supporting Small Business Relief as at 31 December 2019	18
q. Number of hereditaments receiving Discretionary Scheme relief as at 31 December 2019	122

SMALL BUSINESS RATE RELIEF

r. Number of hereditaments contributing to the small business rate relief scheme by paying the additional supplement as at 31 December 2019*	888
s. Number of hereditaments that receive a discount from the small business rate relief scheme as at 31 December 2019*	1,893
of which:	
<i>i. Hereditaments with a rateable value between £0 and £12,000 receiving the maximum discount</i>	1,800
<i>ii. Hereditaments with a rateable value between £12,001 and £15,000 receiving the discount on a sliding scale</i>	93
t. Number of hereditaments that pay only the small business rate multiplier and are not granted a discount as at 31 December 2019*	1,504

* The data should be as at 31 December 2019 or as soon as possible after that date.

PART 2 : ESTIMATED VALUE OF RELIEF TO BE GRANTED IN 2020-21

Amount of relief to be granted in 2020-21 (£)

EMPTY PROPERTY RELIEF

a. Estimated value of empty property relief to be granted in 2020-21

-1,803,870

of which:

i. Relief to be given - industrial property above the exemption threshold

-158,743

ii. Relief to be given - listed building status

-287,944

iii. Relief to be given - Community Amateur Sports Clubs

0

iv. Relief to be given - charities

0

v. Relief to be given where the hereditament is empty and is not included in categories i to iv

-968,536

vi. Relief to be given - "non-industrial" above the exemption threshold

-388,647

SMALL BUSINESS RATE RELIEF

b. The cost of small business rate relief for properties within the billing authority area

-4,883,066

of which:

i. Hereditaments with a rateable value between £0 and £12,000 that will receive the full discount

-4,579,579

ii. Hereditaments with a rateable value between £12,001 and £15,000 that will receive the discount on a sliding scale

-303,487

DATE OF LATEST INFORMATION

Date of latest information taken into account when calculating the figures on the supplementary form

31/12/19

Notes :

NATIONAL NON-DOMESTIC RATES RETURN - NNDR1
2020-21
Validation Checks

1.1

Local authority : Chesterfield E1033
 Local authority contact name : Mrs Carolyn Szadura
 Local authority contact number : 01246 345495
 Local authority contact email address : carolyn.szadura@chesterfield.gov.uk

This sheet automatically highlights any validation queries and provides space for your explanations
 The note 'NNDR1 Validation Checks 2020-21' provides further details on the validations we carry out. Please consult this when completing this validation sheet

Test	Data		Change		Parameters		Please comment below where required
	VOA data	2020-21	Actual	%	Actual	%	
1 Check total RV	102,183,000	102,784,681	601,681	1%	0	2%	OK
Mandatory Reliefs							
	2019-20	2020-21	Actual	%	Actual	%	
2 Cost SBR relief	-4,698,979	-4,883,066	184,087	4%	500,000	10%	OK
3 Additional yield to finance SBRR	839,408	884,921	45,513	5%	50,000	5%	OK
4 Net cost of SBRR	-3,859,571	-3,998,145	138,574	4%	250,000	20%	OK
5 Cost of Charity relief	-2,186,565	-2,200,645	14,080	1%	0	15%	OK
6 Cost of CASC relief	-42,810	-43,489	679	2%	20,000	20%	OK
7 Cost of Rural relief	-3,974	-2,970	1,004	25%	5,000	15%	OK
8 Cost of Partly Occupied relief	0	0	0	0%	100,000	20%	OK
9 Cost of Empty property relief	-1,601,013	-1,803,870	202,857	13%	500,000	25%	OK
Discretionary Reliefs							
	2019-20	2020-21	Actual	%	Actual	%	
10 Cost of Charity relief	-54,896	-51,166	3,730	7%	0	25%	OK
11 Cost of non-profit bodies' relief	-97,767	-51,838	45,929	47%	50,000	25%	OK
12 Cost of CASC Relief	-93	-95	2	2%	5,000	25%	OK
13 Cost of rural shop relief	0	0	0	0%	5,000	25%	OK
14 Cost of other rural relief	0	0	0	0%	5,000	25%	OK
15 Cost of other discretionary relief	-26,025	0	26,025	100%	100,000	25%	OK
16 Class A hereditaments	0	0	0	0%	25,000	25%	OK
17 Class B hereditaments	0	0	0	0%	0	25%	OK
18 Net rates payable	41,010,888	42,268,253	1,257,365	3%	0	5%	OK
Other checks							
	2019-20	2020-21	Actual	%	Actual	%	
19 Estimated repayments (Appeals provision (Part 3 Li	-1,914,388	-1,780,785	133,603	7%	2,000,000	25%	OK
20 Zero in surplus / deficit (Part 4, Line 20)		977,155	n/a	n/a	0	n/a	OK
Allocation							
	2020-21	Actual	Actual				
21 Discretionary scheme relief (Part 2, Line 41)	8,942	8,942	0		0		OK
Pre-populated							
	2020-21 form	Actual	Actual				
22 Collection fund opening balance (Part 4, Line 1)	-2,095,095	-2,095,095	0		0		OK

Page 88

Number where comments are outstanding 0

Please provide any further comments below

NATIONAL NON-DOMESTIC RATES RETURN - NNDR1
2020-21
Validation Checks

1.1

Local authority : Chesterfield E1033
Local authority contact name : Mrs Carolyn Szadura
Local authority contact number : 01246 345495
Local authority contact email address : carolyn.szadura@chesterfield.gov.uk

This sheet automatically highlights any validation queries and provides space for your explanations
The note '*NNDR1 Validation Checks 2020-21*' provides further details on the validations we carry out. Please consult this when completing this validation sheet

Test	Data		Change		Parameters		Please comment below where required
	VOA data	2020-21	Actual	%	Actual	%	

NATIONAL NON-DOMESTIC RATES RETURN - NNDR1

2020-21

Supplementary data - validation checks

1.1

Local authority : Chesterfield E1033
 Local authority contact name : Mrs Carolyn Szadura
 Local authority contact number : 01246 345495
 Local authority contact email address : carolyn.szadura@chesterfield.gov.uk

This sheet automatically highlights any validation queries and provides space for your explanations
 The note 'NNDR1 Validation Checks 2020-21' provides further details on the validations we carry out. Please consult this when completing this validation sheet

Test	Data		Change		Parameters					
	2019-20	2020-21	Actual	%	Actual	%				
Mandatory Reliefs										
1	Charity relief	177	185	8	5%	20	10%	OK	Please comment below where required	
2	CASC relief	5	5	0	0%	5	0%	OK		
3	Rural shop relief	4	3	-1	-25%	10	0%	OK		
4	Partly Occupied relief	0	0	0	0%	10	0%	OK		
5	Empty relief	249	254	5	2%	100	30%	OK		
Discretionary Reliefs										
6	Charity relief	42	44	2	5%	30	10%	OK	Please comment below where required	
7	Non-profit bodies' relief	3	2	-1	-33%	20	0%	OK		
8	CASC Relief	2	2	0	0%	5	0%	OK		
9	Rural shop relief	0	0	0	0%	10	0%	OK		
10	Other rural relief	0	0	0	0%	5	0%	OK		
11	Enterprise granted relief	0	0	0	0%	10	0%	OK		
12	Local discount relief	2	0	-2	-100%	20	0%	OK		
13	SBBR - contributing	867	888	21	2%	100	10%	OK		
14	SBBR - getting a discount	1,871	1,893	22	1%	100	10%	OK		
15	SBBR - RV between £0 & £12k	1,783	1,800	17	1%	100	10%	OK		
16	SBBR - RV between £12k & £15k	88	93	5	6%	50	10%	OK		
17	SBBR - just lower multiplier	1,523	1,504	-19	-1%	100	10%	OK		
Number of hereditaments										
		Total Hereds	Hereds included in lines 13, 14 & 17 above							
18	Number hereditaments in tests 13, 14 & 17 above compared to total number of hereditaments	4,289	4,285	-4	0%	25	5%	OK		

Number where comments are outstanding

0

Please provide any further comments below

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EMPLOYER / TRADE UNION COMMITTEE

Monday, 4th November, 2019

Present:-

Councillor (Chair)

Councillors J Innes

Councillors

Serjeant

*Matters dealt with under the Delegation Scheme

11 APOLOGIES

Apologies were received from Councillor Tricia Gilby, Maria Slack, Lesley Waller and Phil Mallender.

12 MINUTES OF THE PREVIOUS MEETING

The minutes were accepted as a true record.

13 MATTERS ARISING FROM THE MINUTES

The Chief Executive gave the committee an update on the recruitment of a new Director of Finance and Resources relating to minute number six. He advised that there had been 12 applicants for the post, five were interviewed and one candidate was identified as suitable to continue the assessment process but due to personal circumstances they withdrew. The Chief Executive and Executive Directors were still discussing the possible options and it was hoped there would be an update at the next meeting.

14 DRAFT PARTNERSHIP AGREEMENT

The Human Resources Business Partner introduced the new Partnership Agreement to the committee. It was explained that prior to October 2016 Departmental Joint Consultative Committees existed and a combined Council Joint Consultative Committee met with trade union representatives.

The Employer Trade Union Committee replaced the previous arrangements in October 2016 but no formal terms of reference had been agreed. It was acknowledged that there had been some difficulties recently with a lack of agenda items and inconsistent attendance.

The new Partnership Agreement broadly reflects the terms of the original Joint Consultative Committees and seeks to reinforce the Council's commitment to cooperative working. It outlines the process for accessing facility time to enable union representatives to attend committee meetings.

Discussion took place around the lack of representation present at the meeting and the requirement to send substitutes to enable the work of the committee to proceed. Comments on the agreement were presented to the Human Resources Business Partner to be considered in order for a joint consensus to be reached.

RESOLVED –

1. That any additional comments on the Partnership Agreement be submitted to the Human Resources Business Partner within seven working days.
2. That a formal signing of the agreement, subject to any comments being satisfactorily addressed, take place on Monday 18th November, 2019.

15 ANY OTHER BUSINESS

There was no other business.

EMPLOYER / TRADE UNION COMMITTEE**Monday, 13th January, 2020**

Present:-

Councillor P Gilby (Chair)

Andrew Fowler Councillor	UNISON	Councillor	Serjeant
Paula Stevens	J Innes	Huw Bowen	Chief Executive
Tony Devereux	UNITE	Rob Wilkes	UNITE
Richard Staniforth	UNISON	Dean Clarke	GMB
Sandy Gillham- Hardy	Finance	Ade McCormick	Executive Director
	Human Resources		

*Matters dealt with under the Delegation Scheme

**1 DECLARATION OF INTEREST BY MEMBERS AND OFFICERS
RELATING TO ITEMS ON THE AGENDA**

There were no declarations of interest received.

2 APOLOGIES FOR ABSENCE

Apologies for absence were received from Maria Slack and Lesley Waller.

**3 MINUTES OF THE EMPLOYER TRADE UNION COMMITTEE HELD
ON 4 NOVEMBER, 2019**

The minutes were accepted as a true record.

4 MATTERS ARISING FROM THE MINUTES

Paragraph 13 outlined an update by the Chief Executive on the recruitment process for a new Director of Finance and Resources. The committee heard that since the last meeting, the post of Assistant Director of Commercial Services had also become vacant. Conversations around options were ongoing and an opportunity had arisen to make changes in the Corporate Management Team with a view to achieving a more fit for purpose structure. Salary benchmarking was underway alongside

discussions with all involved parties and a report would be prepared for the Joint Cabinet and Employment and General Committee once this had been completed.

The Chief Executive assured the committee that once sufficient information was available, conversations would take place with all those affected by any proposed changes.

5 EMPLOYER TRADE UNION COMMITTEE PARTNERSHIP AGREEMENT

The Executive Director presented to the committee an update on the new Partnership Agreement. Two amendment requests had been received since the official signing. These had been circulated to Union representatives and no concerns had been raised.

The Human Resources Business Partner highlighted the proposed changes as follows;

- Paragraph 37 – increase the number of conference days for UNITE to four, in line with GMB
- Paragraph 47 – remove the final line of text; *Individual trade unions may also give notice to withdraw from the agreement, in which case they will cease to be recognised by the council.*

All involved parties confirmed that they were happy to go ahead with the changes and a copy of the amended agreement was signed by the Chief Executive, Leader and representatives from GMB, UNISON and UNITE.

6 ELECTION OF A VICE-CHAIR

Andrew Fowler, of UNISON was nominated to be vice-chair of the committee. This was agreed unanimously.

7 JOB EVALUATION POLICY

The Human Resources Business Partner presented the new Job Evaluation Policy to the committee. The Unions had been consulted on the contents of the policy throughout its development and compromises made accordingly.

The committee approved the policy.

8 **APPRENTICESHIPS**

A union representative raised a concern regarding apprenticeships and the possibility that an apprentice could reach the final stages of their training and then be deemed unsuitable for long-term employment with minimal notice. The HR Business Partner assured the committee that this would not happen as the apprentices were appraised regularly by both their tutor, against the apprenticeship framework and by their line manager in line with the council's policies and procedures. The committee was reminded that apprentices were subject to the same probationary period as other council employees.

The Executive Director added that apprentices are appointed in two circumstances;

1. Appointments made against an existing vacancy
2. When a service area has sufficient resource available to appoint an apprentice as a supernumerary post.

The second option should be clearly identified at the recruitment stage. The Leader assured the committee that apprentices are supported throughout their training and the HR Business Partner confirmed that help applying for alternative jobs was available.

9 **HEPATITIS B VACCINATIONS**

A query was raised regarding issues recently encountered by members of staff when requesting Hepatitis B vaccinations from the council's Occupational Health provider.

The HR Business Partner advised that there had been a national shortage of the vaccine over the last 18 to 24 months. This was the reason for the delay. However, the situation had since been resolved and the vaccine was once again widely available. The established programme of vaccinations had been recommenced.

The Leader of the Council asked that the guidance for staff regarding vaccinations be re-issued.

10 **BUDGET UPDATE**

The Deputy Chief Accountant updated members on the development of the General Fund Revenue Budget Summary for 2020/21 and future years.

The latest revised budget for 2019/20 showed a projected surplus of £75k. The Acting Chief Finance Officer advised that, in advance of the final budget for 2019/20 being agreed by full Council on 26 February, 2020, work would be undertaken between Cabinet Members and the Corporate Management Team to continue to identify further savings and income generation proposals.

The Leader of the Council advised that public consultations were taking place on the budgets and these had been well attended by members of the public.

The Chief Executive explained to the committee that the Council has a legal responsibility to set a budget and evidence that it can balance the books. There were plans in place to discuss options with the cabinet at a forthcoming away day. The committee was assured that the Council was well provisioned in terms of its reserves and that the Housing Revenue Account was in a very strong position.

11 **MEETING DATES AND TIMES**

The next meeting of the committee will take place on Monday 10 February, 2020 at 9.30am in Committee Room 2 at the Town Hall, Rose Hill, Chesterfield S40 1LP.

It was agreed that in the next civic year, the first Monday of the month would be avoided to help with committee members' availability.

COUNCIL HEALTH AND SAFETY COMMITTEE

Wednesday, 13th November, 2019

Present:-

Andrew Fowler (Chair)

Donna Reddish (Policy and Comms) Anthony Radford (Arts and Venues) Hazel James (HR Business Partner) Dean Epton (Commercial Services) Ian Waller (Health & Wellbeing) Neil Johnson (Economic Growth) Gurpreet Khakh (H&S Rep) Rob Wilkes (UNITE)	Councillor Paul Niblock Councillor Keith Falconer Councillor Peter Barr Councillor Jean Innes Ade McCormick (Exec Director) Liz Cook (Housing) Paul Longley (Unison) Marc Jasinski (Corporate H&S Adviser)
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Min. No.	<u>Item</u> Decision/Action	By Whom
20	<p><u>APOLOGIES FOR ABSENCE</u></p> <p>Apologies for absence were received from Rachel O’Neil and Tony Devereux.</p>	
21	<p><u>MINUTES OF THE MEETING HELD ON 21 AUGUST, 2019</u></p> <p>The Minutes of the meeting of the Council Health and Safety Committee held on 21 August, 2019 were agreed as a true record and signed by the Chair.</p>	
22	<p><u>MATTERS ARISING FROM THE MINUTES</u></p> <p>It was confirmed that the quarterly report for Customers, Commissioning and Changed had been circulated after the previous meeting.</p>	

	<p>Written reports were submitted by members of the Council's Corporate Management and Senior Leadership Teams to update the Committee on health and safety matters from their service areas during the last quarter.</p> <p>The reports provided information on workplace inspections, specific incident investigations, training, communications, and the development and progress of annual health and safety action plans.</p> <p>The key points raised from the reports were as follows;</p> <ul style="list-style-type: none"> • Progress had been made on the Health & Safety action plans for both the Pomegranate and Winding Wheel. The wording in the inspection update needed to be amended so that it reflected the fact that although the training records did exist, they weren't readily available at the time of inspection. • A new Health & Safety Officer had been recruited for the Commercial Services team. • Problems with water on the stairwells in the new Saltergate Multi-storey car park had been identified and were being addressed by the contractor without additional cost to the council. • Internal audit had conducted another review of the Corporate Health & Safety Recovery Plan and determined a rating of reasonable assurance. The report would be presented to the next committee meeting. • The Contractor Management Register was emphasised as the council's agreed method for recording all information on contractors and monitoring their performance. It must be used by all services and kept up to date in order for it to perform correctly. Contractor Management to be a standing agenda item for the committee moving forward. 	<p><u>ANTHONY RADFORD</u></p> <p><u>IAN WALLER</u></p> <p><u>AMANDA CLAYTON</u></p>
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25	<u>OCCUPATIONAL ILL HEALTH STATISTICS</u>	
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	<p>The Human Resources Business Partner gave an overview of the occupational ill health statistics. Members of the committee requested a further breakdown of the data for the next meeting in order to understand where the pressure points may be.</p> <p>The Chair reinforced the process of reporting work related absences onto the SHE system, including the details of any investigation and its outcomes. A review of the process would be undertaken to determine if this was the most efficient method of recording work related absences.</p>	<u>HR</u>
26	<p><u>INCIDENT/ACCIDENT INFORMATION</u></p> <p>The Corporate Health and Safety Advisor reminded the committee that entries on to the Council's SHE system must include details of the investigation undertaken and the actions taken as a result.</p> <p>The committee requested an up to date list of Health and Safety representatives in order to determine whether automatic email notifications can be set up from the SHE system.</p>	<u>ANDY FOWLER</u>
27	<p><u>DATE AND TIME OF THE NEXT MEETING</u></p> <p>The next meeting of the Health and Safety Committee will take place on Wednesday 12th February 2020 at 9.30am in Committee Room 1 at the Town Hall.</p>	