

Rates Retention 2018

An Overview for Billing Authorities

Lessons learnt and maximising the use of retention for local services

This programme is designed for senior staff in the local authority sector looking to understand how best to make use of Rates Retention from 2018. The speakers are all experienced specialists in their fields, and are accordingly well placed to give busy local government professionals quality advice to support effective use of Rates Retention from 2018. This programme is likely to be useful to:

- Finance specialists and directors;
- Revenues Managers; and
- Policy makers and strategists.

Rates Retention Programme

9:15-9:45 Arrival / registration / coffee

9:45-10:45 **Session 1: Losses on Appeals in CCA**
Roger Messenger - Wilks Head and Eve, Partner

- The Check Challenge Appeal system
- Challenges for losses on appeals
- Methods which can be relied upon

10:45-11:30 **Session 2: LA Portfolios**
Iain Dewar - Wilks Head and Eve, Senior Partner

- BA Engagement – your own portfolio/completion Notices etc.
- CCA – to appeal or not appeal
- Valuation – BA occupations – opportunities and risks

11:30-11:45 Break (refreshments Provided)

11:45-12:45 **Session 3: RatesFinder and maximising the Taxbase**
Simon Horsington - Simon Horsington & Associates Ltd, Director

- Where to look for increasing revenue
- The VOA rules and the EBAR Process
- How to Avoid No Actions

12:45-13:30 Lunch

13:30-14:30 **Session 4: Local Government 2020, and a CE View**
Richard Harbord - MRF UK Ltd, Owner

- The scale of the funding gap
- Delivery of essential local services in a time of austerity
- Innovation
- Timing on Retention
- Pilots
- LA funding – Central List

14:30-14:45 Break (refreshments Provided)

14:45-15:45 **Session 5: Caselaw developments in Rating**
Timothy Morshead QC - Landmark Chambers

- Recent caselaw which applies to Rating
- What this means to the Billing Authority
- Risks from the ratepayer side of the fence

15:45-16:15 Panel questions and close

Speakers Include:

Roger Messenger

BSc Hon CAAV FRICS FIRRVC MCI Arb Registered Valuer REV

Wilks Head and Eve, Partner

Roger is a Partner at Wilks Head and Eve, and has twice been elected to the office of President of the Institute of Revenues Rating and Valuation.

A regular contributor to national standards in the development of Rates Retention with both the IRRV and separately with the RICS and the Rating Surveyors Association. Roger is at the forefront of the rating valuation development of policy in practice, and as the country determines how, in practice, Rates Retention will be implemented.

Iain Dewar

Dip.Est Man FRICS FIRRVC MCI Arb RICS

Wilks Head and Eve, Senior Partner

Iain is Senior Partner with Wilks Head & Eve and has been with the partnership for 38 years. He is a chartered surveyor with some 43 years' experience, qualifying in 1978, and is a member of both the Institute of Arbitrators and the Institute of Revenues Rating and Valuation. He has been a member of the executive committee of the Rating Surveyors Association and is also an RICS Registered Valuer. He has extensive experience and knowledge of valuation and rating valuation and also conducts valuations for accounts purposes, rating, compensation, acquisitions and disposals covering a wide spectrum of property types.

Simon Horsington

Simon Horsington & Associates Ltd, Director

Since 2013, Simon has been working together with Wilks Head and Eve to design and deliver an effective, comprehensive solution to the challenges of the Business Rates Retention system.

Richard Harbord

**M.Phil, CPFA, FCCA, IRRV (Hons), FCMI, FMIS, MIMC, FRSA
MRF UK Ltd, Owner**

Richard spent 39 years in Local Government, working in 8 Local Authorities in London and the South East. Richard became Chief Executive and Director of Finance at the London Borough of Richmond in 1988 and became Managing Director of London Borough of Hammersmith and Fulham in 1999. He left there in 2002 to commence his own consultancy business.

Richard is on the Council of CIPFA (13 years) and remains on the Council of IRRV (28years). Richard is the Chair of the CIPFA Social Care and Welfare Reform Panel.

Timothy Morshead QC

Landmark Chambers

Tim specialises in real estate/property, rating, compulsory purchase and compensation, planning and related areas of public law and has appeared in many of the leading cases in these fields. Recent cases of interest in the field of rating and valuation include:

- Woolway (VO) v. Mazars LLP [2015] AC 1862
- Harding v. Secretary of State for Transport [2017] RA 271
- Sainsbury's Supermarkets Ltd v. Sykes [2017] RA 211
- Berry (VO) v. Iceland Foods Ltd [2017] RA 1
- Hardman (VO) v. British Gas Trading Ltd [2015] RA 254

BOOKING FORM

Rates Retention 2018

10th January 2018

DELEGATE DETAILS

(Please use BLOCK CAPITALS and complete in full)

CORRESPONDENCE ADDRESS

Organisation _____
Address _____

Postcode _____

1ST DELEGATE

Surname _____ Title _____
Forename _____
Job Title _____
Organisation _____
Department _____
Email _____
Telephone _____
Dietary / Access requirements _____

2ND DELEGATE

Surname _____ Title _____
Forename _____
Job Title _____
Organisation _____
Department _____
Email _____
Telephone _____
Dietary / Access requirements _____

3RD DELEGATE Book a 3rd Delegate at half price*

Surname _____ Title _____
Forename _____
Job Title _____
Organisation _____
Department _____
Email _____
Telephone _____
Dietary / Access requirements _____

Booking & Enquiries

LOCATION: Congress Centre
28 Great Russell Street
London
WC1B 3LS

PRICE: £200 per delegate + VAT
*Book a 3rd Delegate at half price**
Includes refreshments and lunch
CPD Hours: 5 hours

CALL: 020 7907 4520

EMAIL: your scanned booking form to:
bhandler@wilks-head.co.uk

POST: your completed form to:
Wilks Head and Eve LLP
Fairgate House
6th Floor 78 New Oxford Street
London
WC1A 1HB

INVOICE ADDRESS

Title _____
Surname _____
Forename _____
Job Title _____
Organisation _____
Address _____
Postcode _____
Telephone _____
Email _____

We will issue an invoice upon receipt of your booking and payment can be made: online by credit/debit card; BACS or cheque. Payment terms are 30 days and payment must be received before the conference date.

I have read the terms and conditions and understand the cancellation policy

Signature required:

PAYMENT DETAILS

Please make payment to:

Wilks Head & Eve LLP.

Bank: HSBC

Sort Code: 40-40-01

Account No: 92322919

Email remittances: tzuluaga@wilks-head.co.uk **or call:** 0207 637 8471

£200 per delegate + VAT

*Book a 3rd Delegate at half price**

TERMS & CONDITIONS

CANCELLATIONS We regret that no refund can be made, although substitutions can be made at any time. Wilks Head & Eve are not able to offer refunds for cancellations arising from events outside of our control.

VENUE AND REGISTRATION DETAILS will be sent within 14 days of the event date. We cannot be held responsible for non arrival of this information, if you have not received within 7 days of the event date, please call us on 0207 907 4520.

PROGRAMME AMENDMENTS Wilks Head & Eve reserve the right to alter the programme or venue without notice due to unforeseen circumstances.

CHANGE OF DETAILS Have your details changed, are they incorrect or you do not wish to receive any future mailings? Please email: bhandler@wilks-head.co.uk

DATA PROTECTION Wilks Head & Eve may use your details to send you information about our further conferences and services. If you would prefer not to receive this information, please tick this box.