



## CASE STUDY - BUSINESS RATES AUDIT

### SOUTH WEST YORKSHIRE PARTNERSHIP NHS FOUNDATION TRUST

South West Yorkshire Partnership NHS Foundation Trust are a specialist NHS Foundation Trust that provides community, mental health and learning disability services to the people of Barnsley, Calderdale, Kirklees and Wakefield. They employ more than 4,400 staff, in both clinical and non-clinical support services.



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Dunlop Heywood's rating audit team contacted South West Yorkshire Partnership NHS Foundation to bring their attention a historic overpayment on their business rates caused by the billing authority's miscalculation. Our thorough research and forensic analysis via the creation of a virtual rates demand meant we were highly confident of achieving a saving if instructed.

Following an instruction from the Trust to proceed, our analysts secured the savings highlighted within 13 days. Our work involved highlighting the billing authority's error with reference to the relevant legislation and their misapplication of the applicable regulation. Rating audit is a highly specialised area with many complex transitional calculations, this leads to numerous errors which can be and are found within certain billing authority's liability calculation software.

#### Key aspects of a Dunlop Heywood audit:

- Non Speculative - Dunlop Heywood only engage with potential clients where an opportunity has been established. In around 90% of cases the opportunity highlighted will result in a saving.
- Efficiency Following Engagement - our fully trained analysts work with our surveyors bringing a unique understanding to the calculation of historic bills. Our expert knowledge of business rates legislation, case law and Billing Authority processes allows us to identify errors accurately.

#### Key achievements are:

- Business rates liability - savings in excess of £40,000