

additional papers 1



Overview and Scrutiny Committee

Thu 20 Jul
2023
6.30 pm

Council Chamber
Town Hall
Walter Stranz Square
Redditch
B98 8AH

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Overview and Scrutiny

Thursday, 20th July, 2023

6.30 pm

Agenda

Membership:

Cllrs:

Sid Khan (Chair)
Sharon Harvey
(Vice-Chair)
Imran Altaf
Karen Ashley
Chris Holz

Joanna Kane
Emma Marshall
Jane Spilsbury
Monica Stringfellow

5. Worcestershire Housing Strategy 2040 - Pre-Scrutiny (to follow) (Pages 5 - 58)

7. Establishment of a Programme Office - Pre-Scrutiny - (to follow) (Pages 59 - 94)

NOTE: Appendix A to this report has only been made available to Members and relevant Officers. Should Members wish to discuss the appendix in any detail when considering this item, a decision will be required to exclude the public and press from the meeting on the grounds that exempt information is likely to be divulged, as defined in paragraph 3 of Schedule 12 (a) of Section 100 1 of the Local Government Act 1972, as amended by the Local Government (Access to Information) (Variation) Order 2006.

Paragraph 3: Subject to the “public interest” test, information relating to the financial or business affairs of any particular person (including the authority holding that information).)

12. Exclusion of the press and public

Should it be necessary, in the opinion of the Chief Executive, during the course of the meeting to consider excluding the public from the meeting on the grounds that exempt information is likely to be divulged, it may be necessary to move the following resolution:

“That, under S.100 (A) (4) of the Local Government Act 1972, the public be excluded from the meeting for the following matter(s) on the grounds that it/they involve(s) the likely disclosure of exempt information as defined in the relevant paragraphs (to be specified) of Part 1 of Schedule 12 (A) of the said Act”.

These paragraphs are as follows:

Subject to the “public interest” test, information relating to:

- Para 1 – any individual;
- Para 2 – the identity of any individual;
- Para 3 – financial or business affairs;

and may need to be considered as ‘exempt’.

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Executive Committee
2023

25th July

WORCESTERSHIRE HOUSING STRATEGY 2021-2040

Relevant Portfolio Holder	Councillor Craig Warhurst
Portfolio Holder Consulted	Yes
Relevant Head of Service	Judith Willis
Report Author	Job Title: Judith Willis Contact email: judith.willis@bromsgroveandredditch.gov.uk Contact Tel: 0152764252 ext 3348
Wards Affected ALL	
Ward Councillor(s) consulted	
Relevant Strategic Purpose(s)	<ul style="list-style-type: none">• Finding somewhere to live,• Aspiration, work & financial independence,• living independent, active & healthy lives• Communities which are safe, well maintained & green.
Key Decision / Non-Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	
This report contains exempt information as defined in Paragraph(s) of Part I of Schedule 12A to the Local Government Act 1972, as amended	

1. RECOMMENDATIONS

The Executive RECOMMEND that:-

- 1) The Worcestershire Housing Strategy 2021 – 2040 be adopted.**
- 2) Officers be asked to develop a Borough Level Action Plan with consideration given to the proposals in this Strategy.**

2. BACKGROUND

- 2.1 The Council adopted a Worcestershire Housing Partnership Plan in 2017 which set out the strategic direction for housing across Worcestershire. This Plan has been reviewed and partners from across the County have produced a Worcestershire Housing Strategy 2021 – 2040 attached as Appendix 1.

Executive Committee 2023

25th July

- 2.2 The Strategy sets out a 20-year vision for the Count, recognising that decisions made today will have a significant impact on housing in the future.
- 2.3 The strategy has been developed with representation from the 7 Worcestershire Local Authorities, NHS providers, local housing providers and the Worcestershire Local Enterprise Partnership (WLEP). It has undergone consultation across a range of stakeholders in the County to ensure that it reflects the needs, challenges, and opportunities in Worcestershire.
- 2.4 The strategy serves several purposes:
- It is a vision for housing in the county to 2040.
 - It provides a statement of intent focused on specific priorities
 - It provides the foundation of a set of more detailed action plans to cause the necessary changes and actions to happen and be delivered.
 - It provides an opportunity to evolve Worcestershire's housing market offer to meet the needs of its citizens and business over the longer term.
- 2.5 The strategy sets out the vision for housing in Worcestershire:
- Worcestershire will be known for excellent housing. Everyone will have choices about how and where they live. Local homes will be warm, healthy and will lead the way towards Net Zero. Worcestershire housing will add to a better quality of life.*
- 2.6 The vision will be delivered through four priority areas, which are:
- a) **Economic growth and jobs-** this priority focusses on the relationship between housing and the economy and the need to supply the right housing for people who live and work in Worcestershire.
 - b) **Quality and standards-** this priority focusses on ensuring that housing in Worcestershire is as good as it can be and that the County takes advantage of innovation in how houses are planned, built and upgraded.
 - c) **Health and wellbeing-** this priority focusses on the importance of affordable, healthy housing that supports everybody, whatever their needs or circumstances as well as creating and

Executive Committee
2023

25th July

maintaining sustainable communities.

- d) Net Zero carbon and climate change-** this priority focusses on ensuring that housing in Worcestershire is decarbonized in line with national targets.

2.7 To accompany the Strategy a Countywide action plan has been developed with each Local Authority having responsibility to develop its own action plan to set out how it intends to meet and contribute towards the ambitions of the Strategy locally.

2.8 Due to the strategy setting out a 20-year ambition, the proposals for delivery are at three levels of detail:

- a) A 100-day plan to create momentum and promote awareness
- b) A 5-year action plan setting out key priorities across each of the four priority areas. These actions will be delivered through Countywide delivery groups.
- c) A twenty-year road map outlining how the components of the strategy will support the delivery of the vision.

3. OPERATIONAL ISSUES

3.1 Upon approval of the Strategy, Officers will develop an individual Borough-level action plan.

4. FINANCIAL IMPLICATIONS

4.1 There are no direct financial implications associated with adopting this strategy

5. LEGAL IMPLICATIONS

5.1 The deregulation Act 2015 abolished the statutory requirement for Council's to produce a Housing Strategy.

5.2 However, it is recognised across all the Worcestershire Council's and partners that Housing is key to the quality of life of residents and that this Strategy will provide future a vision and future direction to achieve this.

6. OTHER - IMPLICATIONS

Relevant Strategic Purpose

Executive Committee
2023

25th July

6.1 The Strategy will support the Council's following Strategic purposes:

- Finding somewhere to live,
- Aspiration, work & financial independence,
- Living independent, active & healthy lives
- Communities which are safe, well maintained & green.

Climate Change Implications

6.2 Carbon reduction is a key feature of the Strategy with the fourth priority being 'Net Zero carbon and climate Change. This provides an ambition to reduce the impact that dwellings have climate change and help the Council meets its Climate Change Strategy vision.

Equalities and Diversity Implications

6.3 There are a range of equality considerations which have been taken into account in the development of the strategy. This includes the changing demographics across the County where it is projected that there will be an increasing ageing population and therefore a greater demand on later living housing provision.

6.4 Section 3.1 of the Strategy sets our population and Economics information which is then addressed within the Strategy.

7. RISK MANAGEMENT

7.1 Failing to influence the housing market in a strategic way could lead to a rise in homelessness locally, and impact upon the delivery of affordable housing.

8. APPENDICES and BACKGROUND PAPERS

Appendix A – Worcestershire Housing Strategy 2021 to 2024

Executive Committee
2023

25th July

9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Cllr Craig Warhurst	4.07.23
Lead Director / Head of Service	Judith Willis, Head of Community & Housing Services	21.06.23
Financial Services	Peter Carpenter	21.06.23
Legal Services	Claire Felton	21.06.23
Policy Team (if equalities implications apply)		
Climate Change Team (if climate change implications apply)	Matthew Bough	21.06.23

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Worcestershire Housing Strategy

2023 - 2040



Contents

1	Introduction	4
1.1	Context and Background	4
1.2	Content, Purpose and Objectives	6
2	Vision	7
3	Local, Regional and National Context	8
3.1	Population and Economics.....	8
3.2	Organisation, Administration and Strategy	17
3.3	Policy	19
4	Priorities	21
4.1	Overview – What Are the Priorities?	21
4.2	How Are the Priorities Organised?	22
4.3	Strategy Priorities	22
	Priority Area 1 – Economic Growth and Jobs	22
	Priority Area 2 – Quality and standards.....	26
	Priority Area 3 – Health and Well-Being	30
	Priority Area 4 – Net Zero Carbon and Climate Change	33
5	2023-2025 Action Plan	37
5.1	The 100-day plan.....	37
5.2	Action Plan 2023-2025	39
	Public engagement	46
5.3	Long-term transformational road map	46

Foreword

Housing has always been an important consideration for the people of Worcestershire. Our towns and villages are attractive places to live, and many people aspire to move to the county. However, the challenges associated with ensuring that there is enough high quality, suitable housing to meet the needs of all citizens have been critical issues for many years. The cost-of-living crisis in 2022 and a continuing shortage of housing across all tenures has helped to highlight the importance of the role that housing plays in determining life chances in the county. However, there is room for improvement. By thinking of housing as one of Worcestershire's strategic assets, we can plan more effectively to deliver better outcomes, including health, well-being, and our low-carbon futures.

Local authorities play an important part in planning for future housing as well as providing services alongside housing including social care. In Worcestershire, these services are provided by the six District and Borough Councils and the County Council, all of whom are locally accountable. This arrangement ensures that local concerns are addressed in connection with housing and that new development respects local character. Looking forward, the role of local authorities in connection with housing can only become more extensive and more influential. Social care delivered in the home alongside other services for example is set to become an important enabler of independent living for our older residents. Work to improve the condition and performance of our homes will also play a key role in our meeting the UK's net zero carbon objectives.

To meet these expanded, long-term expectations, we need a long-term perspective. We will also need a joined-up approach. Whilst most of the work in connection with housing will continue to be undertaken by individual councils, it will make sense to approach many of our challenges in a consistent and collaborative way. Whilst we value the unique character of Worcestershire's communities, we also recognise that we can come together across the county to plan and to work together to deliver better outcomes for everyone who lives in the county.

In response to the challenges and opportunities we face, we have developed a long-term housing strategy for Worcestershire. The strategy focuses on key issues associated with how housing affects economic growth, jobs and health and wellbeing in the county as well as how housing can be harnessed to meet carbon and climate change ambitions. In the strategy we set out a joint-vision for housing for the period up to 2040 and a series of medium- and long-term priorities that all bodies interested in housing in Worcestershire can get behind. The benefit of having the strategy in place is that we will have a clear long-term vision for the role of housing in Worcestershire that we can all get behind and for which local authorities can be held accountable.

I have thoroughly enjoyed the process of developing the Worcestershire Housing Vision and Strategy, working with colleagues and stakeholders across the county to develop a flexible and adaptable plan that will equip us to work together to deliver better housing for everyone in the county. I am excited about the vision and the plan proposals and am confident that we can equip ourselves to meet the many complex issues surrounding housing in the county. Worcestershire housing will add to a better quality of life, and that is something that we can all work towards.

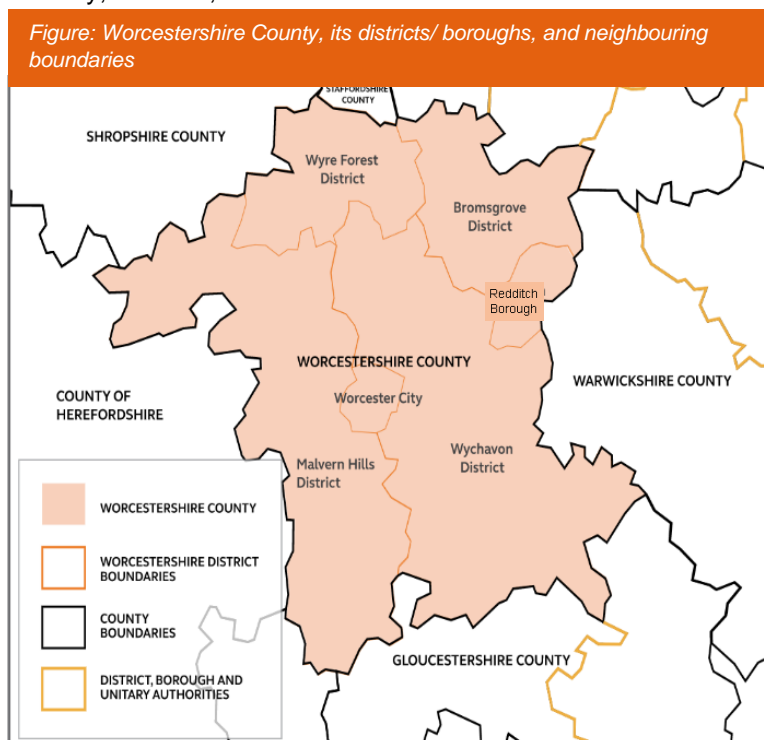


Kevin Dicks, Chair of the Worcestershire Housing Strategy Board

1 Introduction

1.1 Context and Background

Worcestershire benefits enormously from being right in the heart of England. With exceptional links into the UK motorway network, proximity to Birmingham International Airport, and in the medium term, HS2. The County has enjoyed one of the highest long-term economic growth rates outside of the Greater South-East and has real strengths in a diverse range of sectors including advanced manufacturing, agri-tech, cyber security, defence, and IT.



Worcestershire is a great place to live, with a diverse and contrasting choice of characterful urban and rural locations across the six districts/ boroughs. But the county has its challenges. Worcestershire has an older population than the national average, but the working age population is not growing quickly enough. Furthermore, the county's over 65s will grow in number by over 40% by 2040. To achieve its ambitious economic plan through to 2040, Worcestershire needs to build the workforce needed to attract and grow new businesses. To do this it will need to attract new families to live, work and grow in the county and it will need to retain its graduate and young talent. Worcestershire will also need to continue to care for its people, dealing in particular with issues of homelessness and ill-health as well as addressing the long-term implications of an ageing population.

Good quality housing is critical in attracting people to a place, but the Covid pandemic has also underlined the importance of fit for purpose housing in connection with people's health and wellbeing and has further reinforced the link between quality of housing and housing-related services to health and social care. Housing is also responsible for 22% of all UK carbon emissions and policies to accelerate decarbonisation will play a critical role in our fight against climate change.

Local Authorities in Worcestershire have policies and plans in place to manage housing delivery and housing related services in the short and medium term. However, there is the need for a long-term vision and a joined-up plan to enable the two tiers of government in Worcestershire to cooperate and collaborate (with third parties as needed) to deliver the best housing outcomes. Above all, authorities must focus on a range of actions to create and maintain momentum towards the long-term goal.

The 2040 Housing Strategy represents an ambitious, long term and important Vision for the County. It seeks to enable Worcestershire One Public Estate Partnership's (WOPEP) Housing Workstream to 'rebalance the housing market in Worcestershire in support of economic growth'. It sets out steps to support improving physical and mental health and wellbeing, reducing health inequalities, addressing climate change, and taking account of the longer-term impact of Covid-19. In short, it is a strategy that will improve the quality of life for the residents of, and visitors to, Worcestershire.

The starting point is a positive one. The county has a history of collaboration and partnership working across multiple services. Worcestershire developed one of the first One Public Estate (OPE) partnerships and has a very effective integrated care strategy (ICB) underpinned by effective working of local authorities, the NHS

and other health service providers across the county. Building on this well-established pattern, this Housing Strategy proposes further sharing of capability and best practice in a two-tier local authority context. The proposal, designed to ensure that services continue to be delivered in a joined-up way, is unique and has been developed through the collaborative working and engagement of a wide range of public sector partners, private sector businesses including Registered Providers¹ and third sector organisations. It is a Strategy for Worcestershire developed by the partners of Worcestershire.

¹ Registered Provider (RP) is the umbrella term to describe Housing Associations and other third sector housing providers involved in the provision of social and affordable housing. RPs are actively involved in the development of for sale and shared ownership homes as part of a cross-subsidy model which supplements affordable homes grant funding.

1.2 Content, Purpose, and Objectives

The Housing Strategy is focused on the twenty-year period to 2040. During this period, there will be significant changes to the housing market in Worcestershire as well as huge challenges to meet including the net zero carbon transition. Housing in Worcestershire will be very different in 2040 to what it is today.

This means that decisions taken today will have a big effect on the future of housing in Worcestershire, and it is right to plan for this. It is also important that short-term opportunities, that can be taken to improve the experience of housing now, are not missed because of the priorities of a long-term plan.

The 2040 Housing Strategy aims to bring these priorities together, by setting a long-term vision and strategic plan, whilst also identifying suggestions for the tactical 'jobs to be done' that are set out in short-term action plans.

The 2040 Housing Strategy is designed to be read in conjunction with a wide range of other policies and plans. Most importantly, it complements existing development plans and sets out to show how housing development can be well integrated with other aspects of public service focused on health and social care. The Housing Strategy is also aligned to other long-term plans including the Worcestershire LEP Strategic Economic Plan.

The Strategy also complements existing plans aimed at setting the direction of travel for long-term policy in net-zero carbon and for outlining a blueprint for how housing related functions can be most effectively coordinated across Worcestershire.

The 2040 Strategy has five main sections:

- **Vision** – summarising the strategy and the five main challenges to be addressed for Worcestershire.
- **Context** – describing the local social and economic factors that the strategy should address.
- **Strategic priorities** – describing the detailed objectives, actions, and outcomes of the strategy.
- **Strategy review and governance** – setting out the organisation required to implement the strategy.
- **Action plan** – proposing the short and medium-term actions that may follow in the first 5-year period and form the basis of each district's own action plan.

The strategy has been developed by a county-wide team with representation from the 7 local authorities, NHS partners, local housing providers and the Worcestershire LEP, facilitated by Arcadis. We have undertaken extensive consultation across many stakeholders to seek a broad range of Worcestershire focused voices, to understand the challenges and blockers and the opportunities to be addressed by the Strategy. Whilst we cannot take account of all points of view, we are confident that the strategy represents a balanced approach to addressing the many opportunities and challenges that Worcestershire will face between now and 2040.

2 Vision

The Vision Statement

Worcestershire will be known for excellent housing. Everyone will have choices about how and where they live. Local homes will be warm, healthy and will lead the way towards Net Zero. Worcestershire housing will add to a better quality of life.

The Call to Action

The strategy will set out the steps needed to make this happen focused on four priority areas:

- Economic growth and jobs.
- Quality and standards.
- Health, wellbeing, and inclusion.
- Net-zero carbon and sustainability.

Realising the Strategy

To make this vision a reality there are five big opportunities that need to be taken between now and 2040:

- Creating a culture of positive action in connection with housing. This will cover housing services, planning and other services focused on the Home. 'Getting things done' will help to ensure that Worcestershire is dynamic, growing, and a great place for everyone to live. This will be done by planning, by leadership and by everyone involved taking ownership of their role in making Worcestershire a better place to live.
- Reviewing aspects of housing services and planning across Worcestershire and reorganising where it makes sense to do so, sharing resources whilst protecting local accountability. Equipping Districts to take the assertive steps needed to implement the policies and aspirations that are set out in Development Plans.
- Using large scale developments to set the standard for sustainable development including place-based amenities and services. This will include getting the right mix of housing in a scheme and ensuring that services and infrastructure are in place from the outset.²
- Developing and managing affordable and social housing as an integral part of new and existing communities to increase inclusion in Worcestershire. This includes an active role for local authorities as planners, development partners and housing providers.
- Taking a leading role in the promotion of the net zero carbon agenda for housing, including organising and supporting public and private homeowners to meet their net zero targets.

Housing will be better in 2040 because of the active, evidence-led steps that will have been taken to sustain economic growth and housing development and to improve services and delivery. This strategy sets out these active steps and the timetable by which they will be taken. The jobs/actions to be undertaken are outlined in Section 4 – The Priorities.

² Scale in housing development is context dependent. At the largest scale, the strategy describes urban extensions and other strategic developments that will be accompanied by large-scale social and economic infrastructure. However, in the context of rural communities, developments of 100 to 150 homes are also 'large scale' and also create an opportunity and responsibility for local authorities to set challenging targets around housing quality and the quality of wider infrastructure provision.

3 Local, Regional and National Context

3.1 Population and Economics

Worcestershire is situated in the Midlands region of England and the County is home to the six districts/ boroughs of Bromsgrove, Malvern Hills, Redditch, Worcester City, Wychavon, and Wyre Forest. The county has a diverse cultural heritage and a high-quality natural and urban environment. The unique character of the place is appreciated by the local community and attracts visitors and in-migration from all over the country contributing to economic growth.

Population

Worcestershire is home to 598,070 residents (mid-2020 ONS estimate)³ of which circa 60% (354,064) of residents are of working age (16-64). The working age population has grown by less than 1% since 2015. The County has a higher median age of population (45.3) than the regional (39.6) and national median age (40.2). 23% of the population is over the age of 65 which is higher than the West Midlands and England average. The growth rate of the older population is expected to increase steeply with the number of over 65's expected to grow by 42% by 2040 (with a particularly high rate of growth in 80+ year group) against the population growth of 30-45's which is expected to be 10% to 2040.

The number of households in Worcestershire is expected to grow by 20% by 2043. This growth is largely due to an increase in one-person households (over 50%). The number of such households is projected to rise by almost 21,000 over the 25-year period from 2018 to 2043⁴. By 2035, the number of people living alone in Worcestershire is expected to rise by 36%. Both trends are linked to the ageing population.

Different rates of growth in the working-age and later living cohorts are prominent issues for the housing strategy.

The strategy must deliver enough housing to accommodate families to support the growth ambitions of the county.

Similarly, it is important that housing supply and housing related services anticipate demand that will come from an ageing population.

Migration into and out of the County, as well as between districts within Worcestershire, conforms to the established national pattern of migration, with most movement being from rural to urban areas (urbanisation). Worcestershire tends to experience a net gain in almost all age groups. A high inflow of persons aged 75-plus and 60-64 is also prominent as people move into the County after retirement or early retirement.⁵

In Worcestershire, just over 70% of people are defined as living in larger urban areas, with 20% of the population living in rural villages, hamlets, or isolated dwellings. This illustrates that Worcestershire is "less urban" than either the West Midlands region (in which almost 85% of the population live in urban areas) or the whole of England (80% living in urban areas). Over 50% of people living in Wychavon and Malvern Hills live in a rural area, whereas Redditch and Worcester City are almost entirely urban.⁶

Worcestershire residents generally have good levels of health, with life expectancy being better than the national average. Some areas of lifestyle require improvement when compared to the national average. These include excess weight in adults, smoking at time of childbirth, breastfeeding initiation, and early years

³ONS, Mid-Year Population Estimates, UK, June 2020

⁴ONS, 2018-based household projections for local authorities and higher administrative areas within England

⁵Worcestershire Demographic Report – Census 2011

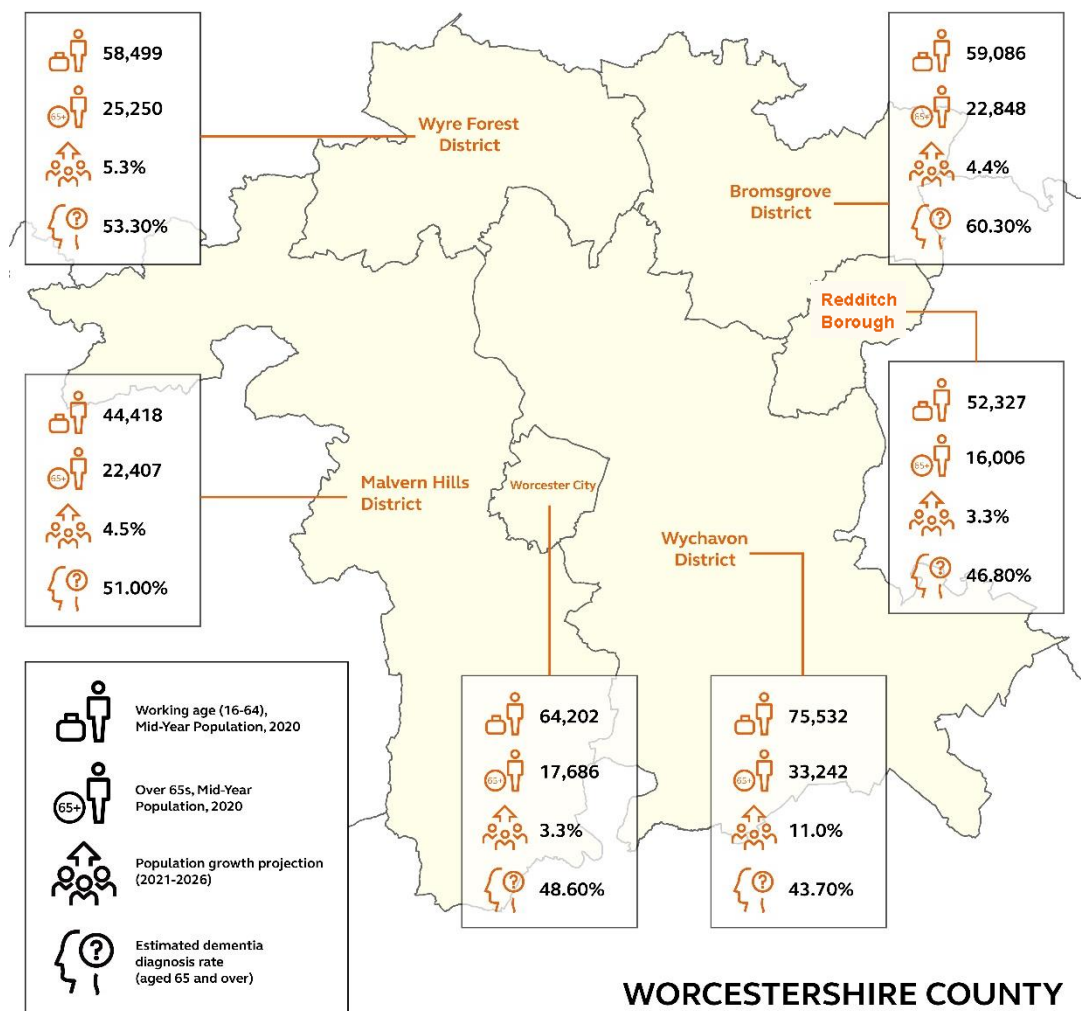
⁶Joint Strategic Needs Assessment Annual Summary September 2019

development for children eligible for free school meals.⁷ Dementia will be a significant issue in future years as the population in the oldest age groups grows. The number of people with dementia in Worcestershire is forecast to increase by 56% between 2019 and 2035 from 9,560 to 14,905.

The requirement for a long-term plan for the reshaping of later-living provision in the county is highlighted in the strategy. This will not only provide a wider range of housing options for the healthy later living cohort but will also support better provision of care services to older clients.

Worcestershire's population does not reflect the ethnic diversity of the wider West Midlands region. The 2011 Census shows that Black, Asian and Minority Ethnic Persons (those not of White British origin) stand at around 7.6% of Worcestershire's average. The estimate of 7.6% in Worcestershire compares to estimates of 20.2% in England and 20.8% in the West Midlands region.⁸ We anticipate that this gap will close over the period of the strategy which may have some implications for future service delivery.

The graphic below summaries key population statistics across Worcestershire:



⁷ Worcestershire Health and Well-being Board, Joint Strategic Needs Assessment 2020, Executive Summary, Health Impacts of COVID-19

⁸ Worcestershire Demographic Report – Census 2011

Economic Performance

There has been good GVA growth in Worcestershire in the last five years, with one of the highest rates of any LEP in England. £14.1 billion GVA was generated in 2018 which is more than 10% of West Midlands total.

Currently there are 290,000 people in employment in Worcestershire, with good growth over the last five years. 3.5% of Worcestershire's economically active population are unemployed and perhaps as challenging, 1 in 18 of working residents have no qualifications. Worcestershire overall, however, performs well when compared to the region and country.

Median gross weekly earnings by residence in Worcestershire is £537 which is approximately 3% less than in the West Midlands and 10% less than in England. (This figure is significantly reduced by the gross weekly earnings in Redditch which is £460/week). Major infrastructure projects such as HS2 and private housing development are expanding at pace and will draw down from the labour supply. There will be a growing labour requirement from repair, maintenance, and improvement work, as for the demand retrofitting existing buildings to meet net zero emissions targets becomes more important. Covid-19 appears to have had little long-term impact on employment in the West Midlands based on latest data⁹ from ONS. Employment levels between May-July 2021 were above pre-Covid levels, and unemployment at 5.1% was significantly below the 5.9% unemployment recorded between December 2020 and February 2021.

Skills development in Worcestershire is addressed in the 2019 to 2024 Education and Skills Strategy, which brings together a county-wide Education and Skills Strategy Board and the WLEP Education and Skills Board. Adult education is likely to be subject to significant development with the announcement of the Lifetime Skills Guarantee in September 2020. This is likely to channel training resources to many skills that are relevant to the Housing Strategy.

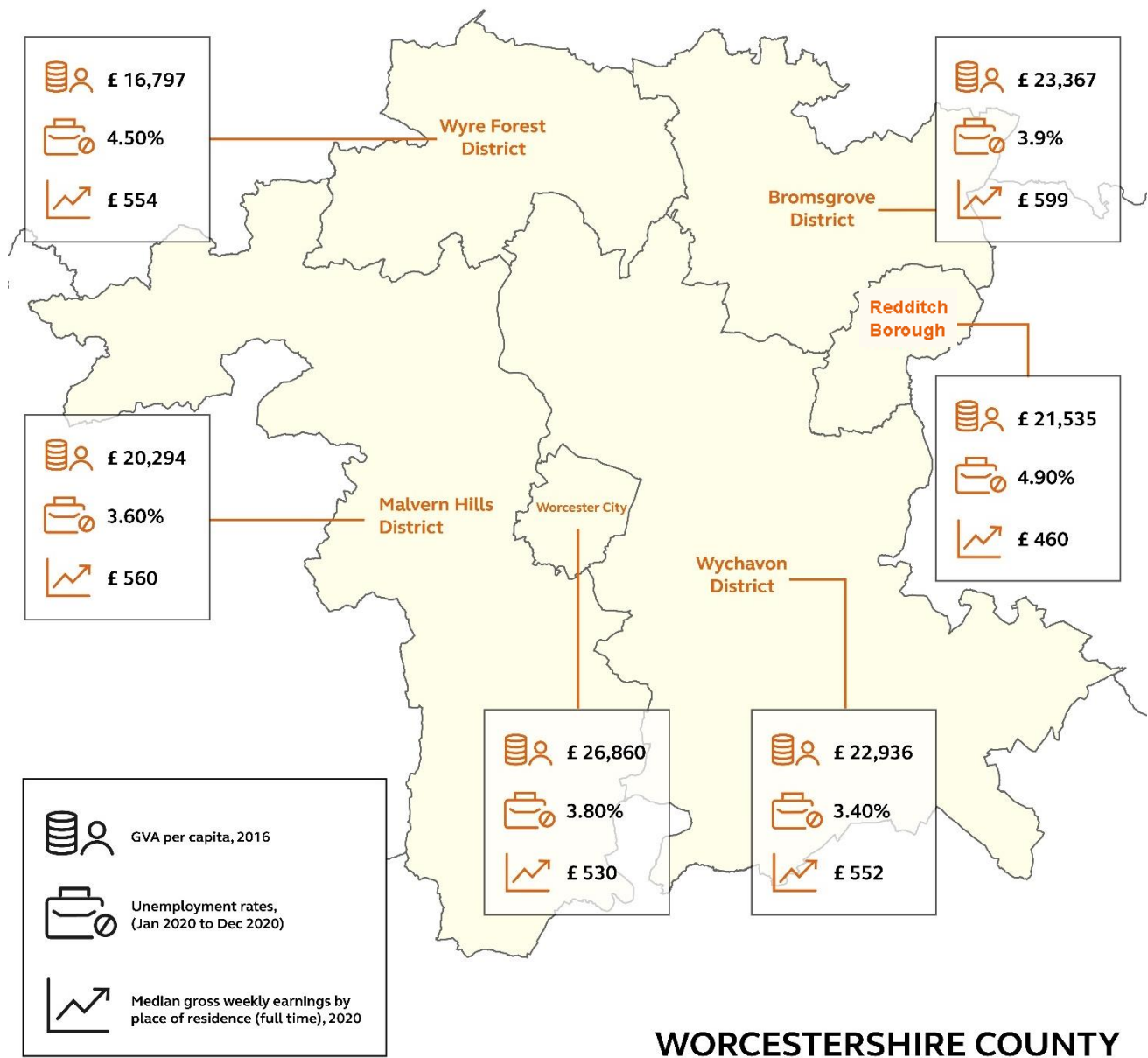
The link between employment and the housing market will be increasingly significant over the next 20 years.

The Strategy highlights the requirement to develop low carbon retrofit supply chains in Worcestershire aligned to national demand for decarbonisation.

These supply chains will potentially be developed to take advantage of existing capability and expertise in the County.

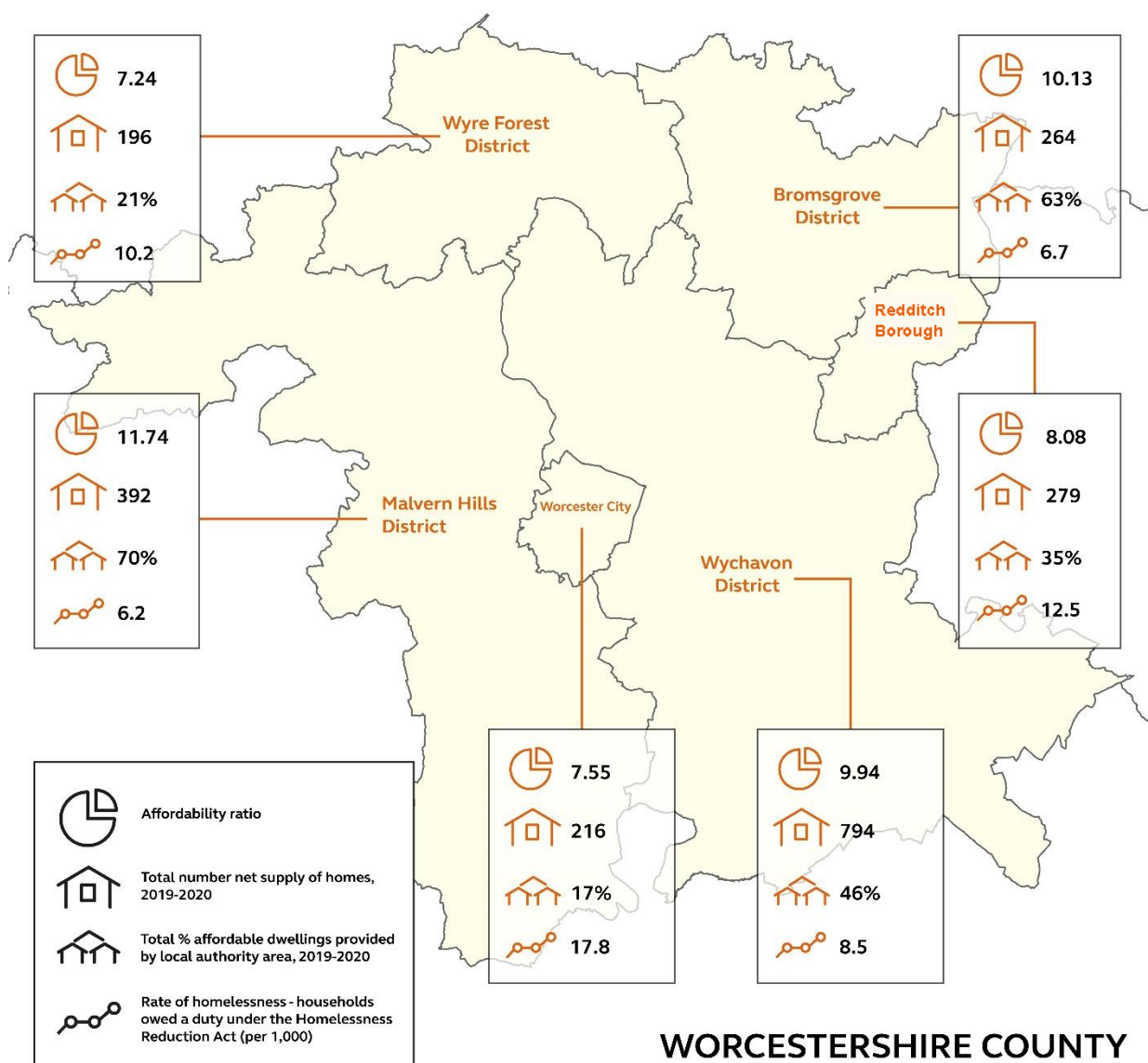
⁹ HI05 Regional labour market: Headline indicators for the West Midlands, published September 2021.

The diagram below summarises economic performance at a District/ Borough level across Worcestershire.



Housing Delivery and House Prices

Worcestershire, like many other places is seeing a growing disparity between house prices and income. Worcestershire's affordability ratio, calculated by dividing median house prices by median gross annual earnings, was 8.87 in 2020¹⁰. By comparison, the West Midlands region affordability ratio is 6.78 and England is at 7.84.¹¹ In Worcestershire, the rate of homelessness in terms of households owed a duty under the Homelessness Reduction Act is 10.3 per 1,000, this is lower than the rate in England (12.30 per 1,000) and the West Midlands (11.20 per 1,000)¹². The rate of homelessness since the 2018-2019 financial year as remained steady in Worcestershire. The diagram below summarises the position at district level, of Countywide affordability, housing supply (including affordable housing) and homelessness.



¹⁰ In 2020, the median house price was £242,000 and median gross annual earnings were £27,285.

¹¹ ONS: House price to workplace-based earnings ratio

¹² PHE, Public Health Profiles (indicator source: MHCLG, Table A1, Detailed local authority level tables financial year 2019-20)

Housing affordability is closely related to the supply of new housing delivered through local development plans. Below is a summary of the Housing Delivery Test: 2020 measurement¹³ which is an annual measurement of housing delivery in relevant plan-making authorities. Generally, local authorities have performed well, with 8,103 homes being delivered across the County against a three-year target of 5,640. As a result of below target rates of build-out, Bromsgrove faces the NPPF's presumption in favour of sustainable development and Wyre Forest must produce an action plan showing how they intend to boost delivery and have a 20% buffer on their housing land supply.

During the period 2017 to 2021, 4,115 affordable homes¹⁴ were delivered in Worcestershire, representing over 45% of the total stock delivered in this period.¹⁵

Table 1. Summary of the Housing Delivery Test, DLUHC

Area	Total number of homes required 2018-2021	Total number of homes delivered 2018-2021	Housing Delivery Test: 2021 measurement	Housing Delivery Test: 2021 Consequence
Bromsgrove	1,413	624	44%	Presumption
Redditch	0	881	n/a	None
Wyre Forest	627	618	99%	None
Worcester City }				
Malvern Hills }	3,281*	5,100	128%	None
Wychavon }				

***Local Planning Authorities with Joint plans being measured jointly for Housing Delivery Test: 2020 measurement*

The implication of presumption in Bromsgrove is that developers are free to bring forward housing development sites outside of the scope of the adopted Local Plan in line with the presumption in favour of sustainable development embedded in the National Planning Policy Framework. This means that Bromsgrove District Council has much less control over local development than would be the case normally, even though the securing of planning consent in the district has been shown to be very difficult over the past 5 years.

Improved housing delivery in Wyre Forest has resulted in the requirement for a 20% buffer being removed. As a result, Wyre Forest District Council has increased control over land in the development pipeline in the past 12 months.

The effective delivery of new housing is an important foundation for the 2040 Strategy.

The challenge will be that the housing continues to be delivered at rates to meet growth forecasts.

Furthermore, it is essential that new development meets the actual housing need of residents in the County whilst also delivering mixed, sustainable communities.

¹³ MHCLG, Housing Delivery Test: 2020 measurement

¹⁴ Note: Affordable housing includes social rented, affordable rented and intermediate housing, provided to specified eligible households whose needs are not met by the market. It can be a new-build property or a private sector property that has been purchased for use as an affordable home. Data sourced from MHCLG, Live Table 1008c.

¹⁵ MHCLG, Live Table 253.

Quality and performance of existing homes

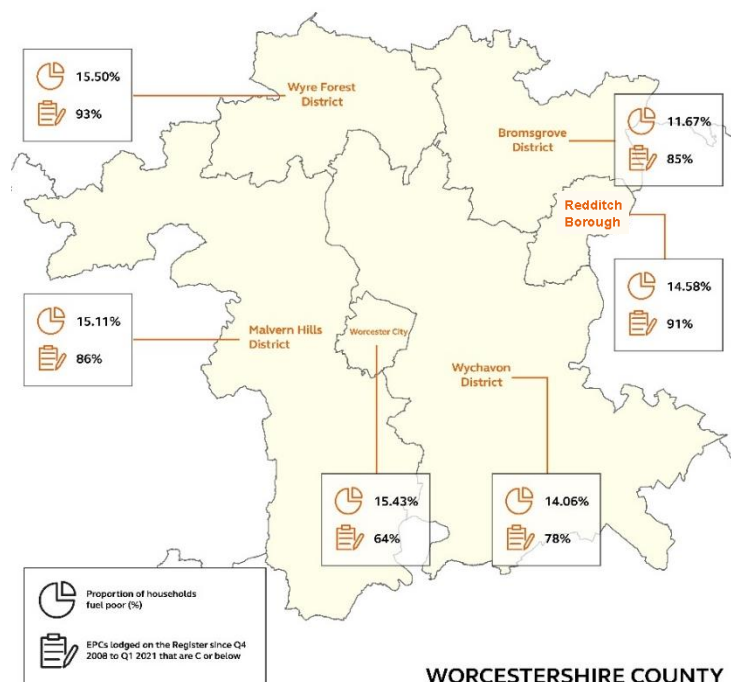
The quality of existing stock is an important consideration with respect to health and wellbeing of residents, and requirements for decarbonisation.

Fuel poverty is a material issue in Worcestershire, affecting around 14.4% of households compared with 13.4% of households in England as a whole¹⁶. A household is said to be fuel poor if it needs to spend more than 10% of its income on fuel to maintain an adequate standard of warmth. Following significant increases in energy costs in the past 12 months, fuel poverty is expected to affect many more people, and as a result, might further accelerate investment in energy efficiency through programmes such as ECO+.

The health effects of fuel poverty are far-reaching and disproportionately affect older people as there are links between cold homes and respiratory conditions. The five-year average for excess winter mortality index in the County is higher than England's five-year average.¹⁷

Energy Performance Certificates (EPC) can be used as a proxy for housing quality and low carbon performance. Data for dwellings lodged on the Register from Q4 2008 to Q1 2021 show that 87% of EPCs issued in the county are C or below (vs 89% in England), whereas 37% of EPCs issued in Worcestershire are for properties in Bands A to C (vs 39% in England) and 6% are for properties in Bands F and G (vs 6% in England). Worcestershire is comparable to the England average.¹⁸

The diagram below summarises the position at district level, of the proportion of households in fuel poverty and the number of EPCs at C or below.



This data highlights the scale of the decarbonisation challenge in Worcestershire and the extent of work that will be necessary to bring homes up to net-zero carbon levels of performance.

¹⁶ ONS: Sub-regional fuel poverty data 2021. This data was collated before the 2022 energy price crisis and reflects the long-term trend.

¹⁷ ONS: Excess winter mortality data, England, and Wales, 2019 to 2020 (provisional) and 2018 to 2019 (final)

¹⁸ Live tables on Energy Performance of Buildings Certificates: Table D1

Connectivity

Worcestershire's central location makes the county excellently connected through a comprehensive multimodal transport network of railways and highways (via M5 and M42), which in turn gives easy access to markets and skills. Birmingham Airport is at the doorstep of the county which provides access to 100 international locations.

Accessibility within Worcestershire is naturally affected by the rural nature of much of the county, where low population densities are associated with a lower-grade road network. This is particularly the case in the North-west of the County. A limited number of road crossings over the River Sever are also a constraint to mobility and a cause of congestion.

Worcestershire is crossed by two nationally important rail lines – the North Cotswold line from London Paddington to Worcester, Great Malvern and Hereford and the Bristol to Birmingham Line. Local services operate to Birmingham along the Kidderminster, Bromsgrove and Redditch routes which face challenges of overcrowding, particularly during peak periods.

Cross Country services between South-West England, Birmingham, and the North-West and North-East pass through but do not stop in Worcestershire, and the County's network suffers from various constraints such as mechanical signalling and single line tracks which have a direct impact on train service timetables. The opening of Worcestershire Parkway station in 2020 adds capacity and connectivity to the network and enhances accessibility to the North Cotswold Line and Cardiff – Nottingham Cross Country services.¹⁹

Worcestershire's rail connectivity requires improvement and the critical importance of rail as a key enabler of economic activity and growth is reinforced in the Local Transport Plan.

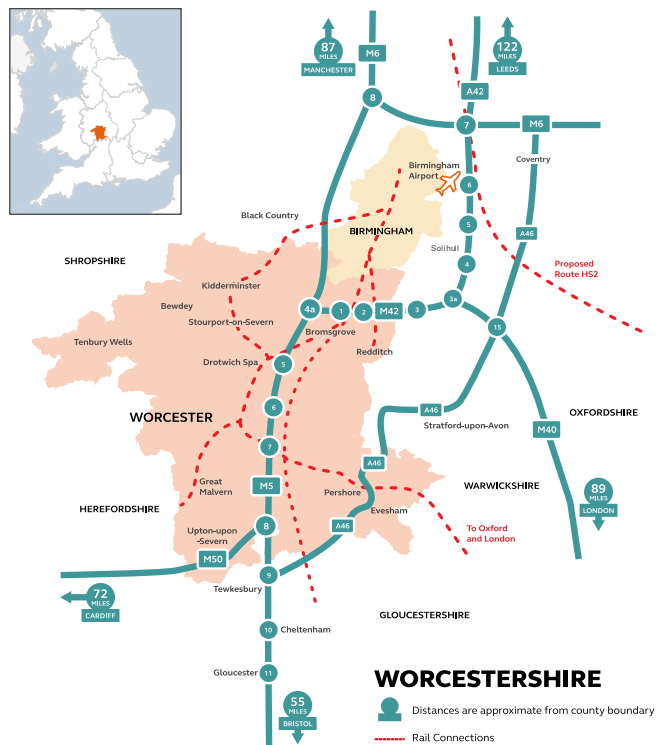


Figure: Location plan (top left) and transport map (bottom right)

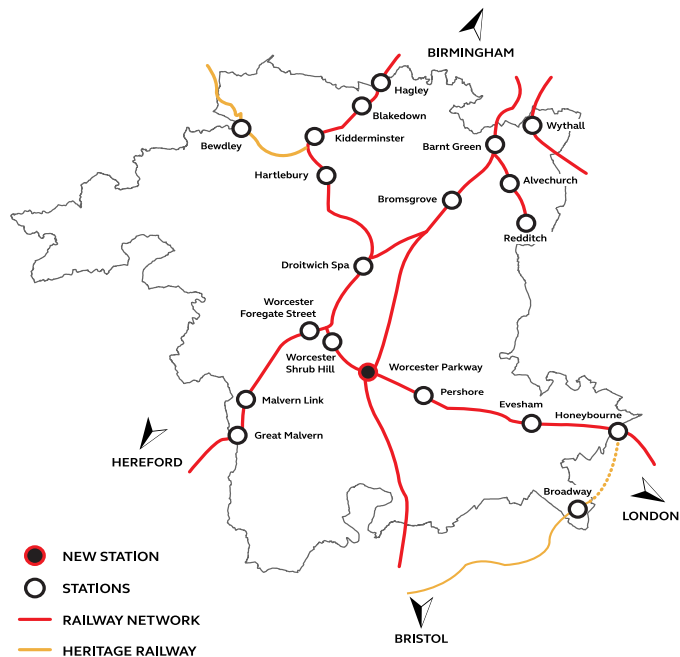


Figure: Rail connectivity plan

The implication for housing development is that much-needed improvements in transport network connectivity are likely to free-up further land for large-scale housing development in future – creating opportunities for the development of sustainable mixed communities as advocated in this Strategy.

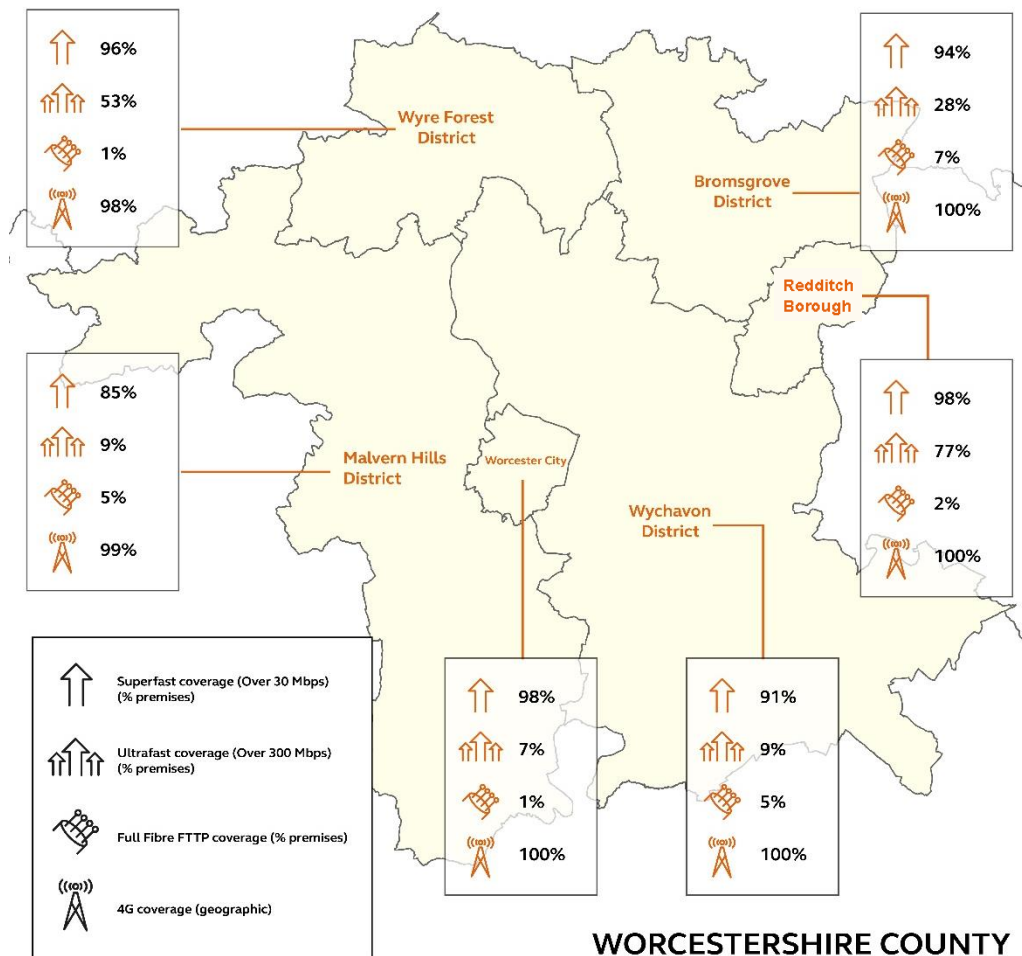
¹⁹ Worcestershire Rail Investment Strategy, 2017

Redditch Borough

Worcestershire has good digital connectivity but there is room for improvement. Over 95% of premises have superfast broadband (30Mbps or greater) coverage and over 98% of the geography has 4G signal availability. By contrast, only Redditch and Wyre Forest have more than 50% of premises covered by ultrafast broadband (300Mbps or greater). The Fibre to Premises (up to 1 Gbps) coverage in Worcestershire needs improvement with Bromsgrove having 8% of premises covered (highest in the district) and Worcester City and Wyre Forest having 1% of premises covered (lowest in the district). Worcestershire is nevertheless driving innovation and has one of the first 5G testbed networks in the UK, operating from sites in Malvern and Worcester.²⁰

Worcestershire's digital ambition and continued investment inherently will facilitate both remote working and the delivery of digitally enabled home care and support services.

The diagram below summarises the position at district level, of broadband coverage across the County.



Digital capability will play a significant role in meeting the ambitions of the housing strategy.

Following the creation of the Worcestershire Strategic Housing Partnership, this housing strategy will be important to maintain the close functional relationship between the districts and partners to work together to support the LEP's ambitious Strategic Economic Plan.

²⁰ Worcestershire County Council Digital Strategy 2021-2023

3.2 Organisation, Administration and Strategy

Worcestershire is a 2-tier county formed of Worcestershire County Council and six District / Borough Councils. The County Council is responsible for services across the whole of the county such as education, transport, and social care. District/ Borough Councils are responsible for services such as housing and planning services. The table opposite provides a quick guide to the typical allocation of local authority responsibility for major services in England.

Status of Local Plans

The councils' shared vision for the future of the county is the foundation for the development of the Housing Strategy 2040. All parts of the county have developed their Local Plans and the Housing Strategy 2040 will respect and build on those Local Plans. The National Planning Policy Framework (NPPF) reinforces the need for a plan-led approach to securing infrastructure as well as promoting sustainable development. The status of the Local Plans is listed below:

- Bromsgrove District Local Plan (2011-2030) - review underway, consultation closed.
- Borough of Redditch Local Plan (2011-2030) - review commenced.
- Wyre Forest District Local Plan (2016 - 2036) was formally adopted in April 2022.
- The South Worcestershire Development Plan (2016-2030) which is the Local Plans of the partners Malvern Hills District, Worcester City and Wychavon District Council. The development plan is being updated to 2041. A consultation on the review closed in December 2022.

Status of WLEP Plans

The Worcestershire Councils have worked closely with the Worcestershire Local Enterprise Partnership (WLEP) over the last 10 years bringing together a strategic partnership to facilitate the collaboration of the private, public and education sector to deliver meaningful programmes to support economic growth in the county. Significant improvements have been delivered through the Counties Strategic Economic Plan (SEP) launched in 2014. By 2020 this plan had been successful delivered 38,000 new jobs, 15,990 homes and a £2.0bn increase in GVA (Gross Value Added – GVA).

The SEP set up the Game Changer Programme to help meet the first objective. The programme provides investment opportunities by identifying key development and delivery of strategic sites for companies looking

	County Council	District Council
Education	✓	
Environmental health		✓
Highways	✓	
Housing		✓
Leisure and recreation		✓
Libraries	✓	
Local planning		✓
Local taxation collection		✓
Passenger transport	✓	
Public health	✓	
Social care	✓	
Transport Planning	✓	
Waste collection		✓
Waste disposal	✓	

for larger sites, HQs, and state of the art opportunities in some of the best locations in the country. These sites are shown on the adjacent map and include the Redditch Eastern Gateway, South Kidderminster Enterprise Park, Worcester Growth Corridor and Malvern Hills Science Park.

The SEP recognised the challenges with housing affordability in many parts of Worcestershire and recognise its importance to support economic growth. The Worcestershire Housing Partnership Plan (WHPP) was developed, setting the strategic direction for housing across Worcestershire. The WHPP recognises that to maximise the health, wealth, and wellbeing of the residents of Worcestershire, and make the most effective use of existing resources, Councils need to work very closely with partner organisations across a range of sectors. The implementation of the national Health and Housing Memorandum of Understanding (MoU) in Worcestershire is an early example of this integrated approach to service delivery. The WHPP aims are:

- Effective partnership working to delivery housing outcomes which will in turn support other strategic objectives, such as improved health and wellbeing, educational achievement of children, employment, crime reduction and sustainable communities.
- Improved collaboration, coordination and integration of healthcare and housing in the planning, commissioning and delivery of homes and services.
- Promotion of the housing sector contribution towards addressing the wider determinants of health, social exclusion, and re-offending.
- Maximising the delivery of housing by co-ordinating the activities of housing developers, providers and support agencies which will support economic growth.
- Addressing the housing needs of specific groups and sectors of the housing market.
- The provision of good quality housing to improve health and wellbeing.
- Integrated health, care and support and housing solutions to make best use of budgets across the NHS, local authorities, and partners to achieve outcomes for less; for example, drawing on the Better Care Fund to support service transformation.
- A co-ordinated response to long term changes in population.
- Better use of existing housing stock.
- Co-ordinated support for vulnerable people.
- Increasing availability of affordable homes.

*This plan has now been refreshed and the WLEP has, in May 2023, outlined an ambitious and exciting 2040 new vision for the county that will create a connected, creative, and dynamic economy for all. The aim is to boost the economic value of the county by £2.5bn per year and create 18,500 extra jobs.

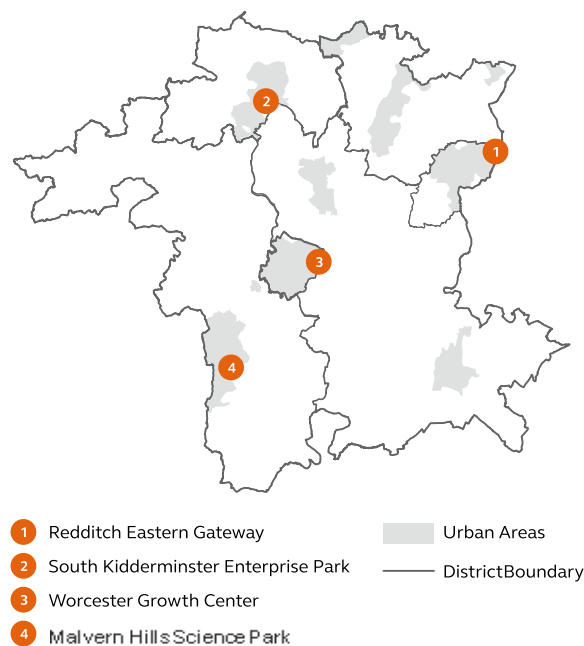


Figure: Economic "Game-Changer" Sites in Worcestershire

3.3 Policy

Housing and housing-related services in Worcestershire are governed by a wide range of policies. Many of these are developed at District level and are set out in Development Plans. They are regularly updated and consulted on and will continue to develop between now and 2040. The purpose of the 2040 Worcestershire Housing Strategy is to establish a common approach where this will improve the experience of residents without reducing accountability associated with local decision making and service delivery.

The 2040 Strategy is also being developed at a time where there will be significant change in housing policy related to planning, regulation and carbon emissions associated with new and existing buildings. There are also likely to be further changes to the management of the health service and the funding and management of social care.

The 2040 Strategy not only accommodates these changes but also sets out plans for a more coordinated Worcestershire-wide response – making better use of resources and in particular equipping authorities to implement changes to deliver the greatest benefit to the people of Worcestershire.

Significant changes to provision of housing and housing-related services include:

- **Social care reform.** The Social Care White Paper was published in December 2021, alongside an initial spending commitment of £5.4 billion for the three-year period to 2024/25. Integrating care with housing is a significant theme in the White Paper, and additional funding totalling £450 million, together with an £210 million extension to the Care and Support Specialist Housing fund (CASSH). Relevant proposals for the housing strategy include:
 - Integration of housing decisions into all health and care decisions
 - Support to the specialist housing market in line with an ambition to create a more diverse range of housing options.
 - Expanded funding for home adaptation.
 - Encouragement of longer-term thinking with respect to lifetime neighbourhoods
- **Housing management reform.** The implementation of the Charter for Social Housing Residents will require a significant change to the relationship between tenants of social landlords. The Social Housing Regulation Bill will further extend the rights of tenants and the powers of the Regulator of Social Housing (RSH) into areas of consumer issues including complaints handling, and housing decency. Together these will drive actions in connection with building safety, the introduction of consumer regulation for tenants, stronger resident engagement, and improved landlord performance metrics.
- **Building Safety Legislation.** The Building Safety Act was passed in Spring 2022. Secondary legislation will be passed over the next 2 years which will detail practical implementation. Local authorities and their affordable and social housing providers will have new statutory duties in connection with the safe management of higher risk residential buildings including undertaking the duties of the Building Safety Manager. These requirements are likely to be implemented prior to 2025.
- **Planning reform.** The Update was introduced into the House of Commons in May 2022. New provisions will affect Local Plans that are currently under development. Relevant aspects of the legislation include:
 - Removal of the requirement to maintain a rolling five-year supply of development land.
 - A greater focus on local planning issues through the introduction of National Development Management Policies dealing with issues that apply to most areas.
 - Further development in Neighbourhood Planning including a simpler neighbourhood planning tool called the Neighbourhood Priority Statement.
 - Replacement of SPDs with independently examined Supplementary Plans which will be used to create planning frameworks for new opportunities (e.g.; regeneration) or authority-wide requirements such as design codes.

- The introduction of a new Infrastructure Levy (IL), that will replace S106 and Community Infrastructure Levy. IL will be charged on sales value. Levy rates will be set locally and can vary within the boundaries of a planning authority. IL will be introduced gradually.
 - Requirements for planning authorities to produce Design Codes describing requirements for a planning consent to be granted, including the opportunity to produce more local design codes. Design Codes will be informed by the National Model Design Code.
 - Processes for assessing environmental impact assessment will be replaced by a single Environmental Outcome Report process. The level of protection will not be reduced.
 - Increase regeneration power including new CPO powers and the creation of a new form of Urban Development Corporation.
 - Enhanced enforcement powers associated with commencement and compliance with consents.
 - Increased fee levels to support better resourcing of the planning process.
- **Environment Act.** This will require developers to deliver 10% biodiversity net gain (BNG) on development projects. Local Authorities will have an active role in approving and monitoring biodiversity plans. BNG requirements will be implemented from 2023 onwards.
 - **Net-zero carbon.** Significant progress will need to be taken to improve the energy efficiency and low carbon performance of over 80% of homes in Worcestershire. The Heat and Buildings Strategy was published in October 2021. Relevant aspects of the strategy include:
 - Government has set a target to reduce carbon emissions from buildings by 47 to 62% by 2035. All homes will need to be upgraded to EPC C by 2035.
 - All homeowners, including local authorities will have to replace all fossil-fuel heating appliances with clean-heat technology by 2050.
 - As part of the Clean Growth Strategy, social renters are required to prioritise fuel poor households, meeting EPC C by 2030.

In the 2022 Autumn Statement, the Government also set a target for a 15% reduction in national energy use by 2030.

- **Levelling-up.** Levelling up is a flagship policy of the Government. The Levelling Up and Regeneration Bill currently passing through Parliament includes a number of provisions to promote the levelling up agenda. These are in addition to the planning reforms noted above:
 - Levelling-up missions. Establish legal duty and powers to set and report on levelling-up missions designed to reduce spatial disparity.
 - Expanded devolution of powers in England to all areas that want devolved powers – e.g., opportunities for bespoke devolution deals, and the creation of a new combined county authority model.

Enhanced regeneration powers including updated compulsory purchase processes described under planning and measures to reinvigorate high streets.

4 Priorities

4.1 Overview – What Are the Priorities?

The Vision for Housing, set out in section 2 is:

The Vision Statement

Worcestershire will be known for excellent housing. Everyone will have choices about how and where they live. Local homes will be warm, healthy and will lead the way towards Net Zero. Worcestershire housing will add to a better quality of life.

The vision will be delivered through four priority areas. Section 4 sets out the actions associated with the priority areas in detail. We describe the four priorities and explain how actions are organised to be delivered over the twenty-year life of the Strategy.

The implications of the current wave of policy development and legislation are firstly that housing functions in Worcestershire will be required to implement notable change across most of their activities. This creates an opportunity to rethink some of the existing delivery models, taking advantage of modern technologies and remote and collaborative working. The new policy landscape also means that local policies will need to be reviewed and updated to take account of new priorities. The 2040 Strategy aims to start this process.

The priorities are the first level of structure of the Strategy. They relate to the greatest challenges facing public authorities in Worcestershire and the policy framework within which they operate. The priorities have played an important role in the development of the Strategy including detailed engagement focused on how housing is affected by activities in each priority area. The priorities are:



Economic growth and Jobs



Quality and Standards



Health and Wellbeing



Net-zero carbon and Climate Change

- **Economic growth and jobs** describe the relationship between housing and the wider economy of Worcestershire. This priority includes the supply of the right housing for people who live and work in Worcestershire and the creation of employment opportunities close to where people live. *By focusing on this priority, Worcestershire will become a more attractive location for employers and more prosperous, and it will make it easier for people to get to their place of work.*
- **Quality and standards** are about making sure that Worcestershire housing is as good as it can be and that people benefit from changes in how houses are planned, built, and upgraded. This priority will help Worcestershire take advantage of housing innovation whilst respecting the character and quality of the existing housing and communities. *Making this a priority emphasises the need to plan and prepare for changes that are coming to housing markets including forthcoming planning reforms, ensuring that the greatest benefit is secured from these developments as they occur.*
- **Health, wellbeing, and inclusion** focuses on links between healthy housing, places, and well-being for everyone. This priority highlights the importance of affordable healthy housing that supports people at all stages of their lives, whatever their circumstances. It is also about the creation of sustainable communities

that have all the facilities residents need and which are well connected. Making this a priority will focus attention on improving the quality of existing housing, the planning of new development, as well as thinking about how health and social services can be delivered alongside housing.

- **Net-zero carbon, and sustainability** is the essential focus on making sure that housing in Worcestershire is decarbonized in line with national targets whilst also making sure that the places and communities which we create are resilient, self-supporting, and safe. Making sustainability a priority highlights the long-term nature of investment in places and homes and the critical role that housing will play in addressing the climate emergency.

4.2 How Are the Priorities Organised?

Each of the priorities is described at four levels of detail:



- **The Vision.** This describes the high-level outcome in 2040 that the Strategy will deliver if all the actions are taken.
- **Strategic levers.** These are long-term, joined-up multi-party initiatives that will result in a change to the development, operation, or use of homes in Worcestershire.
- **Jobs to be done.** These are medium term actions necessary to make progress and address blockers to progress. The detailed jobs to be done will evolve during the life of the strategy, partly to reflect progress on the agenda and partly to account for new needs or opportunities.
- **Worcestershire's Plans (the outcome – how Worcestershire will be different).** This describes how the experience of housing in Worcestershire will be different when the strategy is implemented.

4.3 Strategy Priorities

Priority Area 1 – Economic Growth and Jobs

Vision Statement or Objective for 2040

Worcestershire has a competitive housing offer based on thriving communities that attract employers and employees and which support economic growth:

Housing of all types is available to meet all needs including affordable housing and housing for later living. New housing is located conveniently for jobs and other amenities.

In Worcestershire average full-time earnings are 10% lower than the national average.

Why?

- Worcestershire housing stock needs to be aligned to local demand as well as the wider market.
- Ample affordable stock is needed because earnings in Worcestershire are below the national average.
- An expanded Later Living provision is important to deal with the expected growth in the elderly population.
- There are wider opportunities to attract a workforce by freeing-up and improving existing housing for use by young families.

Worcestershire's median population age is over 45 – 5 years older than the median for the West Midlands.

The number of over 60's will grow by 85% by 2035.

<ul style="list-style-type: none">Steps taken by Local Authorities in Worcestershire support the viability and delivery of housing across a range of tenures.Worcestershire has made good progress delivering a high proportion of affordable housing, but this does not meet the needs of all residents.By partnering with developers, and actively participating in housing delivery through the release of public land and direct development, local authorities will have greater influence over the housing that is delivered.			<i>Worcestershire's housing affordability ratio in 2020 was 8.87, compared to 6.78 for the West Midlands.</i>
Strategic Levers			
Lever 1 Active use of land in public ownership that is available for development to support mixed community development.	Lever 2 Consistent and joined-up approach to the setting of Infrastructure Levy ²¹ contributions across the county to secure the necessary supply of affordable housing.	Lever 3 Appropriate use of regeneration tools including compulsory purchase and permitted development rights, to support residential development as part of town centre revitalization.	
Jobs to be done			
Job 1 Examine opportunities for coordination and collaboration of planning resources across the county that is compatible with local accountability. Share resources where this will support greater capability or accelerate response to planning reforms.	Job 2 Use large-scale development opportunities including urban extensions as the engine for high quality, mixed-tenure sustainable communities. Actively coordinate or participate in development if needed to secure desired housing outcomes.	Job 3 Equip local authorities in Worcestershire to participate in the development of public land for housing. Consider the establishment of a county-wide development capability in line with proposals for Urban Development Corporations	
Who is involved? <ul style="list-style-type: none">District Council housing, development, and planningCounty Council transport planningOne Public Estate TeamWorcestershire LEPRegistered Providers and other housing providersPartnership housing developersDLUHCGeneral public – through general and project specific consultation			
The outcome – how Worcestershire will be different: <ul style="list-style-type: none">A thriving housing market in the public and private sector, with more choice for everyone.More diverse communities that feature a range of house types and tenures.The joint planning of housing and employment land so that homes are located near jobs.Land values and development models that support the development and maintenance of sustainable communities.			

²¹ The Infrastructure Levy (IL) is being introduced as part of a package of planning reforms included within the scope of the Levelling-Up and Regeneration Bill. The IL is planned to be a non-negotiable fixed % fee charged on the development value of a project. Planning authorities will be able to set the level of the levy, which can vary across the area served by the authority. IL will ultimately replace Section 106 and the Community Infrastructure Levy

Making it happen (essential actions):

Strategic Lever 1: Active use of land in public ownership		
Opportunity <ul style="list-style-type: none"> Public land owned by Local Authorities, Public Bodies and Central Government can be used to increase the delivery of low-cost affordable and social housing. The equity value in public land will enable Local Authorities in Worcestershire to participate as partners in mixed community development. 	Solution <ul style="list-style-type: none"> Public land can be directly developed by a Local Authority. Partnership arrangements can be used to participate in mixed-tenure development schemes. Land can be developed for the private market to create the capital needed for additional affordable housing development. 	Outcome <ul style="list-style-type: none"> Capital released from public land can be invested directly into affordable housing. Local Authorities have the means to participate in development. Local authorities are in the position to incorporate affordable housing in the scope of mixed-tenure partnership development.
Jobs to be done1: Maximise coordination / collaboration in use of planning resources		
Opportunity <ul style="list-style-type: none"> With the upcoming planning reforms and the need to plan for the net zero carbon transition, there are more specialist planning jobs to be undertaken. Coordinating common approaches and resources across Worcestershire is the best way to respond to these challenges. This approach builds on the successful collaboration that has already taken place in South Worcestershire. 	Solution <ul style="list-style-type: none"> Planning reform. Where possible Districts should develop a coordinated response to proposed planning reform including plan development processes, digital systems, and design code templates. Specialist resources (e.g., energy network planners) should operate on a cross-boundary basis. Strategic responses to shared, long-term challenges (net zero carbon, ageing population) should be developed on a county-wide basis. 	Outcome <ul style="list-style-type: none"> Achieve benefits of scale in the delivery of planning services. Resource-efficient response to major changes in planning such as the development of design code templates. Increase ability of Worcestershire to recruit specialist resources. Joined-up approach to long-term strategic objectives.

Other Strategic Levers:

Consistent and joined-up approach to negotiation. Sharing data and adopting a common approach to negotiation with developers with respect to development standards, contributions and sustainability requirements will reduce opportunities for negotiation arbitrage between districts.

Appropriate use of regeneration powers. Permitted Development Rights (PDR) and Compulsory Purchase (CP) are expected to play a valuable role in facilitating development as a part of town centre revitalization. Districts should be able to actively use the provisions of PDR and CP to achieve a balance of investment, appropriate regeneration, and development quality.

Other jobs to do:

Use large-scale development opportunities to set development benchmarks. The strategy highlights the importance of balanced, mixed tenure communities with appropriate amenity provision. Districts should view large scale housing developments including urban extensions as one-off opportunities to deliver these communities. This may require active development participation to deliver the required tenure mix. Proposed reforms to planning including Supplementary Plans and Urban Development Corporations, will provide Districts with the tools to actively engage with developers.

Establish a development capability. To make best use of publicly owned land assets and to be able to influence development outcomes, local authorities could benefit from creating their own development capability. This might involve direct development or partnership working with housebuilders such as Housing Associations or SME developers. Such a capability could facilitate the optimization of the use of local authority assets by enabling the consideration of a wider range of options including the use of Infrastructure Levy funds as finance for direct development. There may be opportunities to build some shared capability at a county-wide level. Specialist District Council resources and initiatives focused on development, could be shared, particularly if this reduces the overall headcount for a development function. A development function managed on a county-wide basis could still support dedicated, District-level development.

Priority Area 2 – Quality and standards

Vision Statement or Objective for 2040

Worcestershire needs to plan and prepare for changes to the way in which housing is built and managed so that the greatest benefit is secured and that the character and quality of existing communities is respected:

Local Authorities make it a priority to prepare for changes in how homes are planned, built, and upgraded.

By 2035, the number of people living alone in Worcestershire is expected to rise by 36%.

Why?

- Housing will be subject to a lot of change during the strategy period, including changes to planning rules, housing management and the wider adoption of Modern Methods of Construction (MMC) for both new build and retrofit. Local Authorities in Worcestershire have an opportunity to influence this change but will need to act quickly and consistently to have an impact.
- Changes to processes and standards are likely to be complex and challenging to implement. Stakeholders must plan to ensure that sufficient resources are available to implement the planned changes effectively, and that opportunities to share expertise and common approaches are taken where appropriate.
- Local Authorities should be ambitious with respect to the quality and safety standards that they set, particularly in connection with the quality and performance of new-build housing, the safety of existing high-rise housing and retrofit to ensure issues with low energy performance and damp and mould are addressed.

87% of EPCs for dwellings lodged on the Register between Q4 2008 and Q1 2021 are C or below.

Strategic Levers

Lever 1

- Support the wider adoption of housing delivered using Modern Methods of Construction (MMC) by collaborating across boundaries to consolidate public sector and Registered Provider demand to support MMC investment in the region.

Lever 2

- Use the planning reforms proposed in the Levelling-Up and Regeneration Bill to encourage great quality development.
- Develop local standards, design guides and codes as needed to secure high-quality development.
- Secure that sufficient resource is in place for any changes to the Local Plan process.

Lever 3

- Prepare to implement the digital technologies envisaged for planning as part of the reforms to the planning system.

Jobs to be done

Job 1

- Collaborate with local businesses, training providers and other partners to plan for development of supply chain capacity in order to meet changing needs and quality requirements.
- The housing strategy should consider wider aspects of delivery capacity in order to

Job 2

- Develop a common approach to Design Codes across the county.
- Districts and distinct areas within districts have the opportunity to have their own codes based on a county-wide framework.

Job 3

- Implement Fire Safety requirements for existing residential buildings over 11m high.
- Implement changes introduced by the Charter for Social Housing Residents.

meet expected supply requirements. Key areas including skills for new build and retrofit construction trades, local developer, constructor and housebuilder capacity and access to specialist developers in areas including co-living and extra-care.	<ul style="list-style-type: none"> • A well-developed design code will enable Districts to deliver much needed housing whilst ensuring that the character of Worcestershire is embedded within local housing standards. . 	<ul style="list-style-type: none"> • These measures will contribute to a better quality of life for affected residents in the county
Who is involved? <ul style="list-style-type: none"> • County Council – planning, public health, and transport • District/ Borough Council – housing, management, housing development and planning • Registered Providers and other housing providers • National, regional and SME housing developers • Housing third parties including funders, insurers etc. 		
Worcestershire’s plan – how it will be different: <ul style="list-style-type: none"> • The safety and quality of housing in the private and public sector will be a top priority evidenced by a proactive response to legislative changes to the management of social housing. The build quality of homes in Worcestershire will be enhanced by the implementation of ambitious design guides and development standards appropriate to place. • The encouragement of a diverse supply chain including local SME developers and investment in MMC capacity related to pooled demand from schemes in Worcestershire. <p>The successful implementation of digital planning systems and other changes will increase popular engagement with planning and other housing related issues. There will be sufficient capable local supply chain capacity to meet all needs of the strategy related to new build and retrofit housing markets.</p>		

Making it happen (essential actions):

Strategic Lever: Support the wider adoption of housing delivered using MMC		
Opportunity <ul style="list-style-type: none"> • Traditional methods of house building are less well suited to the production of high-performance, net-zero carbon homes. • The increase in the capacity of the MMC housing industry will be supported by the consolidation of demand from across Worcestershire. A large visible pipeline of opportunity can be used to attract investment to factories in the county. 	Solution <ul style="list-style-type: none"> • The consolidation of demand for MMC housing will be led by the public sector and by Registered Providers when delivering their own programmes. • A ‘clearing house’ function is required to bring together the demand from multiple programmes, along the lines of those developed for Greater Manchester Combined Authority and Sheffield City Region. • The clearing house will support the procurement of MMC homes from a range of suppliers on behalf of local clients. 	Outcome <ul style="list-style-type: none"> • Access to MMC capacity in Worcestershire will be enhanced by the development of a clearing house function that consolidates demand from multiple clients. • The clearing house will simplify procurement and encourage investment. It might potentially encourage the development of MMC factories in Worcestershire. • The most important outcome will be the quality of homes produced which will contribute to reduced carbon emissions.

Jobs to be done: Plan for the development of supply chain capacity		
Opportunity <ul style="list-style-type: none"> Investment associated with the delivery of the housing strategy will create significant opportunities for business growth and local employment over the next 20 years. New skills in developing areas including low-carbon heat will be needed, whilst traditional skills associated with housebuilding will also be in high demand. Expanded housebuilding, combined with support for SME and self-build housing will encourage the creation of additional housing development capacity. As part of the Housing Strategy, Districts and the County Council should collaborate with the county business and skills ecosystem so that requirements are known and planned for. 	Solution <ul style="list-style-type: none"> Skills requirements specific to the housing strategy should be included in county skills planning including the Worcester Local Skills Plan and other skills initiatives. The Worcester LEP and other stakeholders dealing with skills and industry capability should have a defined role in the delivery of the housing strategy. Planning powers should be used where appropriate to support an SME supply chain and skills development across the county in line with wider economic planning. Skills development should be aligned to the creation of capable and competent low-carbon supply chain (See net zero carbon). 	Outcome <ul style="list-style-type: none"> There will be sufficient business and workforce capacity to meet the opportunities created by the Worcestershire Housing Strategy. Planners, developers, and customers will have confidence that planned developments are deliverable. Local people will have the opportunity to participate in the housing sector including new areas associated with low-carbon construction. The housing sector will be properly integrated into skills and capability markets in Worcestershire and the wider West Midlands region.

Other Strategic Levers:

Use opportunities created by planning reforms to encourage great quality development. The Levelling-Up and Regeneration Bill contains provisions that should enable Districts to raise the bar in terms of housing quality and infrastructure provision in line with local needs. Measures include 'Build Better, Build Beautiful' provisions, new Supplementary Plans and the funding transparency secured from a locally set Infrastructure Levy. A key objective of the housing strategy will be to encourage Districts to plan, organise and resource to secure the greatest leverage from the reforms to deliver better housing outcomes.

Prepare to implement the digital technologies envisaged for planning. Planning reforms will also accelerate the adoption of digital technologies to increase the level of public engagement with the planning process and to support the consent process. Districts should develop the capabilities to implement the required digital change programme.

Other jobs to do:

Develop Design Codes. Design codes are a well-established means of raising the standard of housing design. All Planning Authorities will be required to develop a design code. Some codes, for example, the Essex Design Guide have played an important role in maintaining the quality and character of housing in a locality. Planning Authorities in Worcestershire presently rely on supplementary planning guidance (SPG) that will also be repurposed as part of proposed changes. Districts should develop and implement a joined-up plan for design codes appropriate for different parts of the county in line with the National Model Design Code. The design code process is a departure from current practice and will benefit from a common, lessons-learned approach.

Advance preparation for the introduction of new Fire Safety requirements and housing management reforms. Management of public housing will be subject to significant change during the early part of the housing strategy resulting in much more controlled approach to fire safety management and improved rights of representation for tenants. The new safety regime for occupied higher-risk buildings will apply to occupied buildings that are either over 18m or over 7 storeys high²². Housing authorities and public sector providers should aim to prioritise the implementation of these measures as a means of improving housing services. This can be done by securing representative buy-in and by commencing elements of the change programme ahead of the finalisation of primary and secondary legislation. County, Borough and District Councils will not have a role in the registration, assessment, or assurance of safety regimes for higher-risk buildings.

²² Details of the new safety regime for occupied higher-risk buildings were published as part of a consultation in July 2022.
<https://www.gov.uk/government/consultations/consultation-on-the-new-safety-regime-for-occupied-higher-risk-buildings/consultation-on-the-new-safety-regime-for-occupied-higher-risk-buildings>

Priority Area 3 – Health and Well-Being

Vision Statement or Objective for 2040 <p>Housing has a central role in ensuring good Health and Wellbeing for everyone in Worcestershire:</p> <p>Local Authorities and their partners make it a priority to work to ensure that Worcestershire is a great place to live for everyone.</p> <p>Why?</p> <ul style="list-style-type: none"> Housing plays a crucial role in contributing to quality of life in Worcestershire. Secure and warm housing is essential for good health. Avoiding fuel poverty and homelessness is part of this. Worcestershire has pockets of significant need associated with affordability, security of tenure and access to services. The Strategy prioritises reducing health inequalities, improving the life chances of more disadvantaged people alongside the wider population. Local Authorities and health partners in Worcestershire collaborate to deliver great services to citizens, centred around the home. Housing is recognised as having a key role to place in the provision of adult social care. Worcestershire's Integrated Care System provides a well-developed and collaborative approach to health and social care. The housing strategy will integrate with the Herefordshire and Worcestershire Integrated Care Board. The valuable touchpoints that housing services provide to people with complex care needs will be used to support care pathways. 		
<p><i>By 2035, the number of people living alone in Worcestershire is expected to rise by 36%.</i></p> <p><i>The number of people diagnosed with dementia is forecast to increase by 56% between 2016 and 2035.</i></p> <p><i>14.4% of households are affected by fuel poverty in Worcestershire compared to the national average of 13.4%</i></p>		
Strategic Levers		
Lever 1 <ul style="list-style-type: none"> Increase the delivery of a diverse range of affordable and social housing to suit the needs of citizens at all stages of life. This will equip Worcestershire to address care issues including acute housing needs, homelessness, and wider provision for later living more effectively. 	Lever 2 <ul style="list-style-type: none"> Develop a role for housing in the delivery of health and wellbeing services. This could potentially include service hubs working out of community facilities developed as part of housing schemes. Alternatively, contact points associated with housing services could be used. Integrate with other services that support wellbeing including leisure services. 	Lever 3 <ul style="list-style-type: none"> Adopt an area-based operating model that integrates the community with public and private housing providers and other service providers including leisure facilities.
Jobs to be done		
Job 1 <ul style="list-style-type: none"> Take steps to improve the life chances of people living in poor quality housing. This will include the coordination of Net Zero Carbon retrofit programmes to reduce fuel poverty, tackle damp and mould and deliver improvements to amenities and 	Job 2 <ul style="list-style-type: none"> Develop later independent living housing products in line with an expected increase in the elderly share of the population, meeting the needs of both locals and inward migrants. The products should include co-living and 	Job 3 <ul style="list-style-type: none"> Promote mixed communities, with care supported by digital technologies. This will be achieved by working with a diverse range of housing providers, particularly in connection with larger scale development.

public spaces to encourage active lifestyle choices.	extra-care developments to meet market expectation.	
Who is involved? <ul style="list-style-type: none"> County Council – social care and public health District Council – housing, development, and planning Integrated Care System Partners Herefordshire and Worcestershire Health and Care Trust Worcestershire Primary Care Network Registered Providers and other housing providers 		
The outcome – how Worcestershire will be different: <ul style="list-style-type: none"> Worcestershire has a diverse mix of healthy housing that directly contributes to improved health outcomes. Worcestershire has sufficient housing to need all housing needs. Homelessness and acute housing need are reduced as a result. Herefordshire and Worcestershire Integrated Care Board works closely with providers of housing and housing services to ensure that housing contributes improved health and wellbeing. Social and health services delivery takes place via the home and community, focused on the needs of people. Housing developments are planned to include active travel, community, and social facilities from the outset. 		

Making it happen (essential actions):

Strategic Lever: Increase the delivery of a diverse range of affordable and social housing		
Opportunity <ul style="list-style-type: none"> Good quality housing plays an important role in quality of life. Affordability is important in Worcestershire due to below average wage levels. Homelessness and acute housing need will only be addressed if additional housing is developed to meet the need. Housing aimed to the needs of different groups including single adults and older residents will help to secure those specific needs can be readily met. 	Solution <ul style="list-style-type: none"> A diverse range of housing will be delivered by a partnership approach. It will include the involvement of specialist service providers, housing developers, the public sector and the third sector. New housing will meet the needs of currently underserved groups including families and single young adults at risk of homelessness. The planning system will play a key role in the matching of demand and supply – backed by an evidence-base of need. 	Outcome <ul style="list-style-type: none"> More good quality, healthy, affordable housing will improve health outcomes – particularly for people whose choice of housing is limited due to personal circumstances. Levels of measurable deprivation including homelessness will fall. Housing, health, and social care services will be better integrated with some services being accessible through the use of digital technology enabling access to digital consultation and online services in community settings.
Jobs to be done - Take steps to improve the life chances of people living in poor quality housing		
Opportunity <ul style="list-style-type: none"> Poor quality housing is known to contribute directly to health inequality. Fixing problems with 	Solution <ul style="list-style-type: none"> Net zero retrofit should be prioritised to improve the energy performance of the local 	Outcome <ul style="list-style-type: none"> Worcestershire's net zero retrofit programme delivers

<p>existing housing through retrofit programmes will result in better health outcomes. Improving accessibility in housing will also increase independence and will improve quality of life.</p> <ul style="list-style-type: none"> • Homelessness is closely associated with poor physical and mental health. • Worcestershire has an ageing population. Many older residents live in their own homes. Many of these homes also need to be updated to make them warm, dry, secure, and accessible. 	<p>housing stock and tackle issues with damp and mould.</p> <ul style="list-style-type: none"> • Public programmes should prioritise poor quality housing first. • Disposal of 'hard to improve' housing which will slow down improvement works by public bodies should not be permitted. • Housing providers should develop more dedicated accommodation for the homeless, including making use of PDR powers to develop new accommodation in suitable locations. • Independent living housing should be developed to meet the needs of local residents, enabling existing properties to be improved and reused. 	<p>healthy homes to the most-needy residents before 2030.</p> <ul style="list-style-type: none"> • Public retrofit programmes prioritise housing that is in the poorest condition. • Housing provision for the homeless meets the needs of all groups including single people and families. • Elderly homeowners can access help and support to improve their homes or to move to more suitable accommodation.
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Other Strategic Levers:

Develop a role for housing in the delivery of health and wellbeing services. Opportunities include the integration of housing services contact points with other aspects of support for people with additional care and service needs. Use of digital technologies for housing management and for in-home care will also provide new long-term opportunities to integrate pathways associated with housing, social care, and healthcare.

Adopt an area-based operating model that integrates the community with public and private housing providers. Community-based approaches such as the Asset Based Community Development (ABCD) approach should be considered in the County as a means of organizing services in both existing and new communities. The principle should be that services are developed in consultation with local communities and build on the foundations of existing initiatives rather than replacing with new, centralized models. Initial work using the ABCD model has commenced in Worcestershire. These pilot projects should inform the development of a broadly-based strategy for community engagement through to 2040.

Other jobs to do:

Develop Later Living products including co-living, independent living, and extra-care. Support the development of dedicated/ tailored later living accommodation to enable Worcestershire residents to have a wider range of options including downsizing. Enable development at sufficient scale across the county so that it can be operated economically – attracting more investment. Integrate later living developments as hubs into county-wide social and healthcare provision.

Promote mixed communities, with care supported by digital technologies. The strategy recommends that pathways associated with housing should be used to support the delivery of health and social care services. Two opportunities facilitated by the planning system are the provision of communal hub facilities in new development including within co-living and extra-care settings, and the embedding of devices and connectivity to facilitate digitally enabled support and care. Districts should set and meet challenging targets for the delivery of accessibility modifications to increase the independence of elderly residents.

Priority Area 4 – Net Zero Carbon and Climate Change

Vision Statement or Objective for 2040

Climate change is one of the most important challenges that the housing strategy will address. A large share of the housing stock in Worcestershire will need retrofit by 2040 to meet net-zero targets in line with the Heat and Buildings Strategy²³ (HBS):

Specific roles have been identified in the strategy for Local Authorities, including planning for decarbonisation, decarbonising local authority stock, providing information, and raising awareness of support available for the decarbonisation. Above all, Local Authorities must continue to prioritise the tackling of climate change over the extended period to 2050.

In Worcestershire fuel poverty affects around 14.4% of households

Why?

- Government data suggests that 87% of homes in Worcestershire will require substantial retrofit investment to meet net-zero targets. Retrofit investments will create warmer, healthier homes with lower fuel bills helping to improve well-being (by tackling damp and mould issues) and eliminate fuel poverty.
- Local planning authorities in Worcestershire have opportunities and powers under the Environment Act to intervene to promote biodiversity recovery and improvements to air and water quality.
- Energy transition is a big economic opportunity and Worcestershire already benefits from employment created by Worcester Bosch. There is an opportunity to further develop a low-carbon heat eco-system based on consulting, and installation services focused on the local market.

Strategic Levers

Lever 1

- Support the development of local low-carbon supply chains to deliver high-quality, best value retrofit to the public and social and affordable housing sector. This initiative will build on the long-term finance offered by the Social Housing Decarbonisation Fund launched in 2021.
- District councils should promote the adoption of PAS2035 on programmes beyond the scope of LAD and ECO²⁴
- Adapt procurement models used for the Decent Homes programme such as Fusion 21 to create local jobs, maximise programme buying power and manage retrofit portfolios. Work with registered providers and other large-scale housing

Lever 2

- Promote the development of sustainable communities based in part on the 20-minute town model. 20-minute towns combine a diverse range of homes in different tenures, employment, social and welfare services, and green space within an area that can easily be accessed using public and active travel options. Sustainable communities should also be designed to be healthy and resilient, with ample green space to support exercise and biodiversity as well as long-term responses to climate change threats. The benefits of promoting a sustainable community's model are that it is a holistic response to all of the challenges

Lever 3

- Develop a coordinated plan for benefits realisation associated with the implementation of the Environment Act in connection with housing development.
- Develop a framework for the agreement of biodiversity net gain investments to enhance public realm and public amenity.
- Consider biodiversity net-gain as an integral part of wider programmes associated with protected and priority species and habitats.

²³ BEIS. Heat and Building Strategy. October 2021

²⁴ Energy Company Obligation Scheme. Under ECO energy providers fund housing improvement programmes for low-income households. ECO4 will commence in April 2022.

<p>owners to create a large-scale retrofit programme.</p> <ul style="list-style-type: none"> Develop capacity for energy planning and mapping for decarbonisation in anticipation of the introduction of heat network zoning in 2025. 	<p>highlighted in the Housing Strategy.</p>	
Jobs to be done		
<p>Job 1</p> <ul style="list-style-type: none"> Develop a public engagement strategy aligned to the extended timescales of the HBS. Plan to engage with homeowners through to 2050 to raise awareness of retrofit opportunities. Design the programme and specification to focus on privately rented and owner-occupied housing aligned to incentives outlined in the HBS. Raise awareness of existing and planned incentives for decarbonisation so that NZC opportunities are considered when homes are upgraded. Keep the engagement programme under regular review to assess impact and to align to new incentives as they are developed. 	<p>Job 2</p> <ul style="list-style-type: none"> Progress on decarbonization as quickly as possible targeting the worst performing housing. Prioritise securing funding through ECO, Local Authority Delivery Scheme and Social Housing Decarbonisation. Develop county-wide strategies and targets in line with the long-term evolution of national decarbonization strategies. Anticipate direction of travel and adjust in response to detail such as the 2026 decision on hydrogen gas heating. This applies to new build and retrofit. 	<p>Job 3</p> <ul style="list-style-type: none"> Develop an approach to the net-zero carbon retrofit of homes in Worcestershire focused initially on homes in the public sector but with a long-term target to encourage the upgrade of private homes. <p>This will initially build on existing schemes including ECO/ECO+ and over time will expand to cover the wider private sector including the rental sector.</p> <p>This will anticipate the effect of incentives including funding and triggers for improvement.</p> <ul style="list-style-type: none"> The Worcestershire plan will go beyond the strategy by promoting a common assessment process through an early emphasis on public engagement.
<p>Who is involved?</p> <ul style="list-style-type: none"> County Council – planning, public health, sustainability, and transport District Council – housing, management, housing development and planning DLUHC Midlands Energy Hub Registered Providers and other housing providers Energy generators contributing to ECO. National, regional and SME housing developers. Regional construction supply chain Housing third parties including funders, insurers etc. Training providers including the Higher Education sector. 		
<p>Worcestershire’s plan – how it will be different:</p> <ul style="list-style-type: none"> Worcestershire will make rapid progress in the development of a decarbonisation plan and will be ahead of programme with respect to decarbonisation of existing public and private sector housing through retrofit by 2040. 		

- New communities developed in Worcestershire will be master planned, designed and built to be sustainable from the outset.
- Worcestershire will have a coordinated approach to the implementation of the Environment Act, which will support enhancements to biodiversity and resilience across the County.

Making it happen (essential actions):

Strategic lever: Develop local low-carbon supply chains to be capacity to deliver the retrofit programme		
Opportunity <ul style="list-style-type: none"> • Net zero carbon retrofit will require the development of a completely new supply chain. • Adoption of the PAS 2035 standard will promote the development of a competent supply chain for the roll-out of retrofit at scale. • The development of the supply chain will require a programme of work, competent assured contractors, trained operatives, and a materials supply network. • Local authorities will have access to Social Housing Decarbonisation Funding and wider programmes in connection with the retrofit of the non-residential public estate to accelerate the development of this local capacity. 	Solution <ul style="list-style-type: none"> • This initiative will rely on the long-term development of funding solutions for net zero carbon retrofit in the public sector building on the platform of the Social Housing Decarbonisation Fund. • Local Authorities have developed locally based supply chains for previous programmes such as Decent Homes. A good exemplar is the Fusion 21 programme developed for the 2008 Decent Homes programme. • Fusion 21 featured a visible pipeline of work, a framework of local contractors, a training programme, a bulk material purchasing programme and a pre-agreed pricing framework. 	Outcome <ul style="list-style-type: none"> • The development of a local supply chain for retrofit accredited to PAS 2035 is an essential step to ensuring that Worcestershire people fully benefit from net zero carbon – accelerating home improvement and creating local jobs and a local SME retrofit network. • The outcome of the strategy will be made more certain using proven supply chain models. • Expanded capacity for retrofit in Worcestershire will enable the rate of progress to be maintained and may also achieve savings related to scale economies. • The supply chain should be accessible by the public and private sector.

Jobs to be done: Develop a public engagement strategy to encourage private sector decarbonisation		
Opportunity <ul style="list-style-type: none"> • Most homes in Worcestershire are privately owned. The HBS anticipates that most homeowners will undertake their own retrofits in line with heating system upgrades. • Most homes in Worcestershire will require improvement works, so it makes sense to make early progress on 'no-regret' solutions that improve home comfort. • Eventually home-owners will need to install a low-carbon heat source like a heat pump. However, the right solution might not yet be available. 	Solution <ul style="list-style-type: none"> • The HBS is a long-term strategy designed to work with the 'grain of consumer behaviour'. An engagement strategy needs to be similarly long-term. • Actively participate in 'inward engagement' through public consultation by Government, so the needs of Worcestershire are considered in policy development. • Encourage public adoption of existing and future advice sources as highlighted in the HBS including the Simple Energy Advice platform. 	Outcome <ul style="list-style-type: none"> • Raised awareness of the importance of homes in tackling climate change. Citizens accept the need for substantial change to buildings and behaviours needed to retrofit / decarbonise housing. • Accelerated adoption of energy and carbon saving measures in line with the long-term trajectory needed to meet net zero targets. • People in Worcestershire are aware of the changes that are coming and have the time to prepare.

<p>Making the right changes at the right time is critical.</p> <ul style="list-style-type: none"> • Raising awareness of low carbon opportunities for existing homeowners will increase take-up of solutions over the 30-year period of the HBS. 	<ul style="list-style-type: none"> • Promote awareness of the availability of support including advice and grants • Promote the awareness of retrofit incentives including upgrades to EPCs and other planned changes. 	<ul style="list-style-type: none"> • Housing retrofitted to meet NZC principles will be free of damp and mould. • Active participation by Worcestershire in policy formulation relevant to housing decarbonisation.
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Other Strategic Levers:

Promote the development of sustainable communities. Sustainable communities are a product of the people who live in a place and the homes and other facilities that support them. Sustainable communities should be mixed and diverse, readily accessible and should have facilities that meet the needs of all members of the community. These communities should also be designed to be sustainable in the face of climate change and other environmental challenges. Worcestershire will see large-scale housing development over the 20 years of the strategy. One of the most effective ways of meeting the objectives of all four priority areas will be to ensure that the largest-scale developments make a full contribution to climate change mitigation. This will be enabled by ambitious early master planning supported by local authorities, potentially facilitated by Supplementary Plans and development bodies including Urban Development Corporations.

Strategic lever 2.

Develop a coordinated plan for benefits realisation following the implementation of the requirements of the Environment Act in connection with housing development, including biodiversity net gain. Integrate the plan with housing planning and development so as to support the creation of sustainable, resilient communities. Consider joint working across Worcestershire where this will deliver better outcomes for the local environment.

Other jobs to do:

Accelerate progress on decarbonisation as quickly as possible. The HBS is designed to allow for the adoption of decarbonising technologies with the 'grain' of consumer behaviour. The strategy also promotes 'no-regrets' associated with new-build and off-grid homes where measures taken now will deliver benefit. Public sector retrofit should proceed as quickly as possible with initial support from the Social Housing Decarbonisation Fund.

Targets to increase adoption of low-carbon technologies are challenging, and work to create momentum in Worcestershire allied to existing low-carbon industries will increase the pace of uptake.

Develop an approach to the net-zero carbon retrofit. Most low carbon retrofit will take place in privately owned homes. Standardised approaches to retrofit based on PAS 2035 will help to improve standards, quality, and confidence for the consumer. This work will be delivered by the private sector, but Worcestershire will play a key role in facilitating a common approach. This is likely to involve working with Central, Regional and Local Government Partners to refine common standards suitable for use in the private housing sector.

5 2023-2025 Action Plan

It will be the responsibility of each district council to consider the ambitions set out in this strategy and develop its own action plan.

This section of the report sets out proposals for consideration in the development of these district-level action plans. As the strategy sets out a 20-year ambition, the proposals are at three levels of detail:

- A 100-day plan to create momentum and to promote awareness of the strategy across affected parties.
- A 5-year action plan setting out key priorities across the four priority areas.
- A twenty-year road map, showing how the components of the strategy will come together to support the delivery of the vision.

5.1 The 100-day plan

The purpose of the Housing Strategy is to deliver a step-change in housing provision in Worcestershire.

Worcestershire will be known for excellent housing. Everyone will have the choice of how and where they live. Local homes will be warm, healthy and will lead the way towards Net Zero. Worcestershire housing will add to a better quality of life.

This is summed up in the Vision for Housing:

As set out in this strategy, this vision will be delivered through coordinated action over 20-years across four broad areas of policy:



**Economic
growth and Jobs**



**Quality and
Standards**



**Health and
Wellbeing**



**Net-zero carbon
and Climate Change**

In order to create momentum in 2023, we propose a simple 100-day plan focused on the creation of momentum and awareness. The plan should act as a call for action around the following major opportunities:

- Creating a culture of positive action in housing and planning authorities to secure that Worcestershire is a dynamic, growing, and great place for everyone to live.
- Organising and actively collaborating in housing and planning authorities across Worcestershire. Taking assertive steps to meet the policies and aspirations that are set out in Development Plans.
- Using large scale development to set the standard for sustainable development including place-based amenities and services.
- Develop and manage affordable and social housing as an integral part of new and existing communities to increase inclusion in Worcestershire.
- Engaging with, organising, and supporting public and private homeowners to meet net zero targets.

Actions during the first 100 days:

We recommend the following key actions:

1. Obtain approvals and political support.
2. Develop individual district-level action plans with consideration being given to the proposals in this strategy.
3. Agree areas of collaboration.
4. Develop governance.

This Strategy serves several purposes:

- It is a vision for housing in the county to 2040.
- It provides a statement of intent focused on specific priorities.
- It provides the foundation of a set of more detailed action plans to cause the necessary changes and actions to happen and be delivered.
- It provides an opportunity to evolve Worcestershire's housing market offer to meet the needs of its citizens and business over the longer term.
improving quality of life.

5.2 Action Plan 2023-2025

The proposed action plan summarises the series of key next steps to be implemented during the period 2023 to 2025 in order for the strategy to achieve its purpose. These are organised by the four priority areas, together with a series of important enabling actions. The proposed actions need to be developed by Partners, collectively and where necessary at individual organisational level to respond to the items proposed below.

	Proposed Actions	Outcome	Benefits
Enabling actions			
Engagement strategy	<ul style="list-style-type: none"> Prepare and implement bespoke targeted stakeholder engagement programme. 	<ul style="list-style-type: none"> Aligned stakeholders support for the strategy and implementation of its recommendations / next steps. 	<ul style="list-style-type: none"> Quick and frictionless implementation of strategy delivering early benefits.
Strategy update	<ul style="list-style-type: none"> Agree strategy monitoring and evaluation process. Agree strategy review periods - we recommend a review every 12 months and a refresh every 3 years. Develop review and refresh process. 	<ul style="list-style-type: none"> Constant focus on delivery and evolution of strategy. Maintenance of evidence base of impact and benefits delivered – enabling ongoing stakeholder support. Strategy remains ambitious and future looking. 	<ul style="list-style-type: none"> Strategy remains up to date and relevant to Worcestershire, its citizens, and stakeholders. Worcestershire remains the most attractive place to live, work, learn and enjoy leisure time in the UK.
Governance	<ul style="list-style-type: none"> Monitor the effectiveness of existing governance arrangements as part of the strategy roll-out. Consider establishment of housing board. 	<ul style="list-style-type: none"> Streamlined governance model mobilised. 	<ul style="list-style-type: none"> Identification and recognition of linkages between economic / housing / health activity leading to more impactful decision making and greater benefits being delivered. Development of culture of positive action and collaboration – task and finish approach.
Government support & involvement of DLUHC	<ul style="list-style-type: none"> Develop key areas from the strategy where Government intervention, support or policy change is required to deliver the best possible outcomes. 	<ul style="list-style-type: none"> Strategy outcomes are delivered efficiently and effectively through recognition that support is required and changes in policy are made that positively impact delivery through the life of the strategy. 	<ul style="list-style-type: none"> The type and quality of homes required are delivered in Worcestershire.

	<ul style="list-style-type: none"> Initiate and act on strategic case for Homes England support around key interventions and initiatives. 	<ul style="list-style-type: none"> Homes England resources are deployed to support the Worcestershire agenda. 	
Evidence Base	<ul style="list-style-type: none"> Develop a Plan for collecting, measuring, and reviewing data/ to form an evidence base for decision making and policy changes/support. 	<ul style="list-style-type: none"> Evidence base to demonstrate to developers that a step change in activity in Worcestershire is required – for example NZC and independent living homes 	<ul style="list-style-type: none"> The type and quality of homes required are delivered in Worcestershire.
Economic Growth and Jobs			
Opportunity Pipeline	<ul style="list-style-type: none"> Develop 5+ year public sector pipeline of development sites. Review existing known sites for housing and identify new possibilities e.g., WOPEP estate rationalisation, land promotion, change of use. Classification, appraisal, prioritisation of sites; identifying capacity, viability, timescales, and wider benefits. 	<ul style="list-style-type: none"> Initial programme of sites for development. Increased rate of delivery of social and affordable housing. Visible pipeline for the development of Offsite Manufacture Barriers and enablers to development identified and plans to mitigate prepared. 	<ul style="list-style-type: none"> Pipeline informs opportunity for alternative housing delivery models. Drives efficiency opportunities through better use of assets and associated cost savings. Underpins confidence in ability to directly influence housing market.
Development of housing delivery capacity	<ul style="list-style-type: none"> Use Local Plans to assess the most appropriate way of bringing the sites forward for development Consider alternatives to land sale including establishment of delivery vehicle(s). Establish a clearing house function to consolidate demand for MMC. Assess alternative delivery vehicles considering a range of factors. Explore potential partners such as Homes England, Registered Providers etc. 	<ul style="list-style-type: none"> Establishment of Delivery Vehicle capacity within district councils or option to sell assets to traditional market - aligned to stakeholder ambitions. Delivery of a diverse range of housing to meet the needs of all citizens. Direct delivery sets standards and expectations for large-scale development including sustainable communities. 	<ul style="list-style-type: none"> Ability to accelerate delivery of affordable housing (or other tenure) aligned to county's social, economic, and environmental needs. Setting benchmarks on design quality. Opportunity to explore new innovations and drive forward agreed initiatives e.g., net zero carbon, modern methods of construction, healthy homes etc. Best value capital and revenue generation. <p>*See Quality and Standards action</p>

Effective deployment of housing resources	<ul style="list-style-type: none"> • Build on (existing) collaborative cross-county working practices between district councils to prepare for additional workload and requirements for new capability that will come from planning reform. • Address / assess in terms of 'jobs to be done' and how best to deliver; recognising the significant opportunities transformation could realise. • Adopt a consistent approach to dealing with development parties to secure the necessary supply of social housing. 	<ul style="list-style-type: none"> • Positive action and collaboration between the district councils that is able to respond to the Strategy and adapt to the changes and additional workload that will likely result from planning reform 	<ul style="list-style-type: none"> • Efficiency of delivery / lower cost to deliver / greater capacity to deliver / higher quality of delivery. • Joined up consistent approach to market leading to better housing being delivered across the county. • Best practice developed and applied with a 'local lens'.
Quality and standards			
Support the adoption of MMC housing by collaboration across boundaries to consolidate MMC demand.	<ul style="list-style-type: none"> • Public sector and Registered Provider housing developers to support adoption of MMC solutions at scale. • Clearing house to be established across the county to consolidate demand from multiple programmes. 	<ul style="list-style-type: none"> • Access to MMC capacity in the county is enhanced. • Procurement of MMC housing is simplified for public bodies in the county. • Quality of housing delivered in the county will be enhanced and productivity will increase. 	<ul style="list-style-type: none"> • Increased housing delivery capacity in Worcestershire based on a more diverse housebuilder supply chain. • Delivery of better-quality housing
Plan for the implementation of planning reform to encourage great quality development	<ul style="list-style-type: none"> • Prepare to use planning reform to promote great quality development. • Develop local standards, design guides and codes as needed to secure high-quality development. • Building planning capability to manage large scale consents. • Plan for a faster planning process and secure opportunities for participation. 	<ul style="list-style-type: none"> • Effective implementation of major changes to the planning system. • Better quality development with more amenity for the community. • Improved engagement with stakeholders as part of future housing planning activity 	<ul style="list-style-type: none"> • Smooth implementation of reform to planning. • A housing offer that underpins / supports economic growth. • Increased volume of house building to meet targeted need. • Better use of planning resources across the county.

	<ul style="list-style-type: none"> • Prepare to implement digital technologies as part of planning reform. 		
Develop local supply chain capacity	<ul style="list-style-type: none"> • Prepare for opportunities associated with growth in new build and retrofit markets. • Collaborate with local businesses, training providers and other partners to plan for development of supply chain capacity. • Consider business capacity as well as skills. 	<ul style="list-style-type: none"> • Sufficient capacity is planned to meet the requirements of the housing strategy. • Local people have the opportunity to participate in the housing sector. 	<ul style="list-style-type: none"> • Housing requirements are met. • The housing market supports good quality jobs and local enterprise. • Worcestershire economy benefits from further diversification
Design Codes and Quality Standards	<ul style="list-style-type: none"> • Develop a common approach to development of localised Design Codes across the county. • Set minimum standards and expectations for large scale development / settlements. • Take a lead on permitted development rights in town centres. 	<ul style="list-style-type: none"> • Driving the delivery of housing aligned to Worcestershire's economic and community / citizen needs. • Delivery of citizen centric, mixed sustainable communities with high quality placemaking principles as standard. 	<ul style="list-style-type: none"> • Housebuilders in Worcestershire deliver beautiful homes that meet the needs of all occupiers. • Worcestershire is the best place to live in England. • Zero carbon communities are developed with increased resilience to climate change and lower cost of retrospective measures.
Advance preparation for the introduction of new Fire Safety requirements for existing residential buildings	<ul style="list-style-type: none"> • Develop a plan to implement forthcoming building safety legislation in connection with Local Authority and Registered Provider managed housing over 11m in height (where relevant). • Integrate the plan with wider reforms in connection with the management of social housing. 	<ul style="list-style-type: none"> • Worcestershire will have a county-wide plan to implement building safety management programmes as soon as practicable. • Reforms will be implemented as a single programme. 	<ul style="list-style-type: none"> • People living in affected housing will benefit from improved safety management practice.

Health, wellbeing, and inclusion.			
Increase the delivery of a diverse range of affordable and social housing.	<ul style="list-style-type: none"> Develop an accurate model to forecast demand for lower-cost housing. Design of affordable housing requirements in the planning system to meet diverse housing needs. Wide range of tenures in large-scale developments including urban extensions. Local authority participation in development. 	<ul style="list-style-type: none"> Data-led approach to affordable and social housing provision. Supply of housing aligned to the needs of the local working population. Greater diversity of housing supply, particularly in larger development. 	<ul style="list-style-type: none"> Worcestershire meets the housing needs of all citizens. More choice of social and affordable housing increases social mobility. Homes and jobs are located more closely together.
Tackling homelessness	<ul style="list-style-type: none"> Review the findings and recommendations of the Homelessness and Rough Sleeping Strategy to align ambition and direction. 	<ul style="list-style-type: none"> A joined-up approach to resolving the challenges of homelessness and rough sleeping. 	<ul style="list-style-type: none"> The strategy will seek to deliver a long-term housing solution to the homeless of Worcestershire.
Improve the life chances of people living in poor quality accommodation	<ul style="list-style-type: none"> Prioritise net zero retrofit to deal with poorest quality housing first. Develop dedicated housing to meet the needs of the homeless. Prohibit the disposal of hard to decarbonise homes in public ownership. Promote private sector retrofit schemes to older residents in privately owned homes. 	<ul style="list-style-type: none"> Worcestershire's most needy residents benefit from warm, healthy accommodation. Public retrofit funding is focused on housing that is in the poorest condition. Fewer people are homeless. Elderly homeowners can access support to improve their homes. 	<ul style="list-style-type: none"> Improved health outcomes for Worcestershire's most needy residents. Greater equality in access to healthy housing. Greater independence for elderly homeowners who will be helped to improve their homes.
Deliver housing suitable for later living in line with forecast demand	<ul style="list-style-type: none"> Anticipate growth following the reform of funding for social care including sector-specific forecasts. Work with partners to provide evidence base to support and promote the adoption of 'Lifetime Homes 	<ul style="list-style-type: none"> Planned housing supply in line with predicted demand. Resilient new housing able to meet the requirements of all potential residents. Increased interest from the development supply chain in the development of age-specific housing. 	<ul style="list-style-type: none"> Worcestershire meets the needs of an important and growing housing cohort. Older residents live in suitable housing. Family homes are recycled for younger families.

	<p>Standards' to reflect better the demographics of the county.</p> <ul style="list-style-type: none"> • Work with partners to provide evidence base to support and promote later living housing through the planning system. Enable private sector operators to achieve scale in the county. • Work with extra-care housing providers to respond to the post-COVID-19 landscape and in raising the quality of existing accommodation to meet market expectation and need. 	<ul style="list-style-type: none"> • Extended life of existing sheltered housing stock. 	<ul style="list-style-type: none"> • Health issues associated with loneliness and fuel poverty etc are addressed.
Develop a role for housing in the delivery of health and wellbeing services.	<ul style="list-style-type: none"> • Collaborate with Integrated Care System Partners with the need to identify opportunities to better integrate housing service and healthcare pathways. • Identify opportunities to pilot health and well-being hubs using existing community facilities. • Learn from assisted tech pilot undertaken by Community Housing and current initiatives and commission a single strategy to explore how digital technology can be used to facilitate healthcare in the home (over the long-term). 	<ul style="list-style-type: none"> • Build on existing collaborative initiatives. Make full use of the contact opportunities created by housing services to provide other support as needed. • Develop a partnership-based model for shared community services and activities focused on the shared community facilities delivered by new build housing development. • Accelerate the adoption of digital care services. 	<ul style="list-style-type: none"> • More joined-up working centred on the home. • Effective use of community facilities to host outreach activities and events. • Early appreciation of the potential of digitally enabled home healthcare ahead of growth of demand in Worcestershire.
Net zero-carbon and climate change			
Public engagement	<ul style="list-style-type: none"> • Develop long-term plan for public engagement to increase awareness of the need for home decarbonisation and access to resources 	<ul style="list-style-type: none"> • Worcestershire people understand the issues, are engaged and are ready when they need to act to decarbonise. 	<ul style="list-style-type: none"> • Faster rate of decarbonisation • Wider base of support for decarbonisation measures • More homes that are healthier, less polluting and free of damp and mould.

		<ul style="list-style-type: none"> • Fewer chances to progress decarbonisation are missed because of better knowledge. 	
Healthy, sustainable communities	<ul style="list-style-type: none"> • Set standards and expectations for the delivery of high quality, mixed-tenure sustainable communities. • Promote the development of sustainable communities based in part on the 20-minute town model. • Carry out feasibility study / pilot project on creating a model of “Worcestershire Healthy Housing”. 	<ul style="list-style-type: none"> • Development of sustainable communities that are great places for everyone to live. • Evidence base developed for new model of housing development. 	<ul style="list-style-type: none"> • Healthier more economically active population. • Places that promote healthy, economically active lifestyles leading to lower costs for public services. • Reduced long-term cost of health and social care to the public sector. <p>Worcestershire is seen as a trailblazing county – the healthiest in England.</p>
Net-zero carbon retrofit	<ul style="list-style-type: none"> • Review current and planned NZC initiatives in the county and beyond including engaging with Registered Providers to assess size of opportunity / demand / need. • Develop a common approach to the retrofit challenge for both social and private housing based on PAS 2035. • Promote awareness and benefits of Net Zero Carbon retrofit to homeowners. • Prioritise / pilot poor quality housing with multiple issues e.g., high energy costs, risks to health through for e.g., damp and mould. • Develop local low-carbon supply chains to deliver retrofit to the public sector. • Consider the countywide economic model where the public sector takes a proactive/ interventional role in delivering retrofit to the private sector. 	<ul style="list-style-type: none"> • Worcestershire local authorities have a plan for retrofit and are active participants in discussions about funding and implementation. • A common approach minimises duplication of resources and inconsistent standards. • Homeowners are engaged early, creating awareness. • Worcestershire develops a local supply chain to deliver assured net zero carbon retrofit. 	<ul style="list-style-type: none"> • Early progress and quick wins on the biggest housing challenge affecting Worcestershire. • Consistent implementation minimises operational disruption to Local Authority housing teams. • Capture the economic benefits through local supply chain opportunities. • Accelerate the transition to a zero-carbon county. • Accelerate retrofit programmes to improve quality standards of existing homes with better energy efficiency and being free of damp and mould.

Public engagement	<ul style="list-style-type: none"> • Develop long-term plan for public engagement to increase awareness of the need for home decarbonisation and access to resources 	<ul style="list-style-type: none"> • Worcestershire people understand the issues, are engaged and are ready when they need to act to decarbonise. • Fewer chances to progress decarbonisation are missed because of better knowledge 	<ul style="list-style-type: none"> • Faster rate of decarbonisation • Wider base of support for decarbonisation measures • More homes that are healthier and less polluting.
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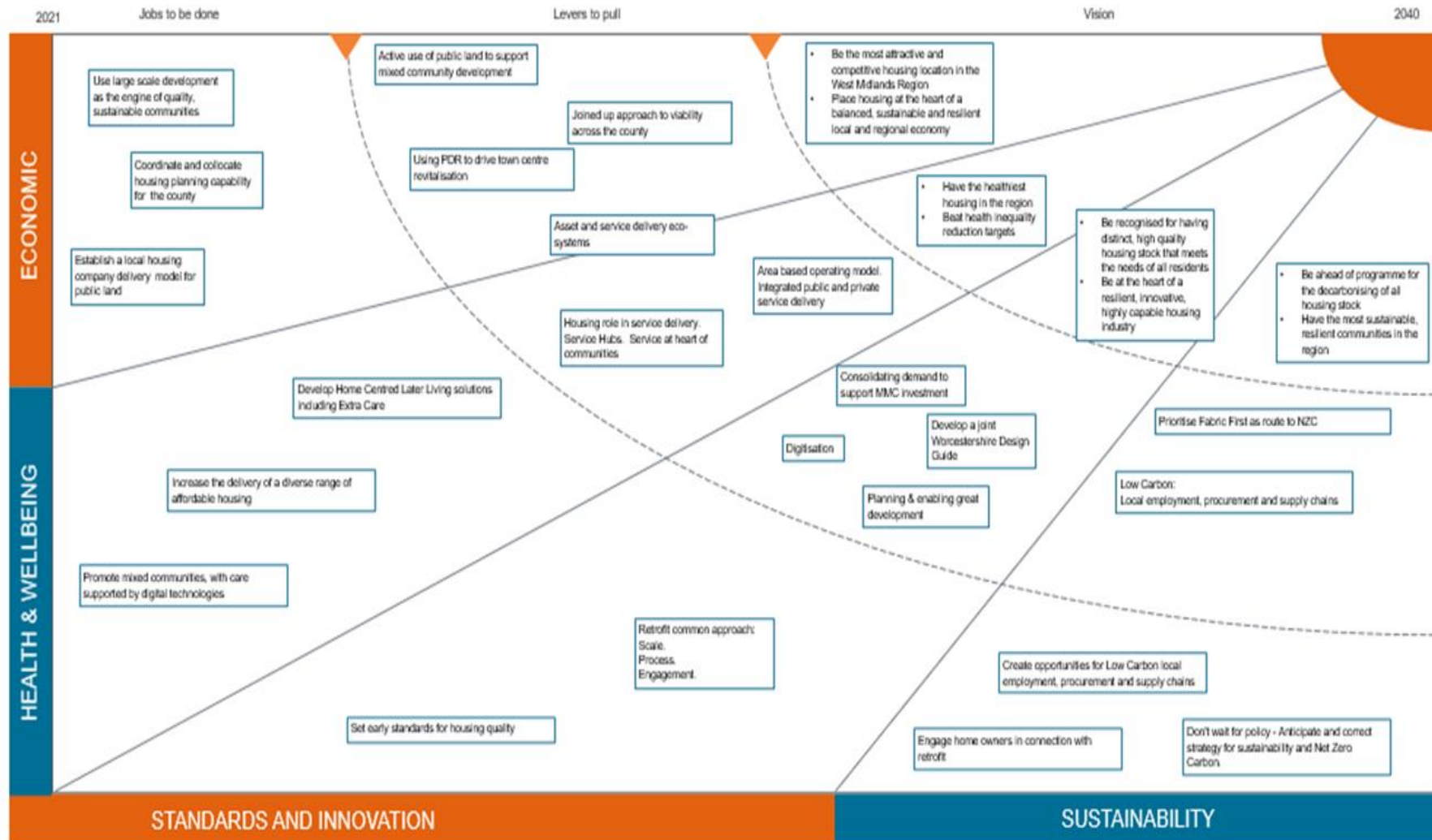
5.3 Long-term transformational road map

The road map summarises the main activities that are described and explained in the priorities section in the sequence required to deliver the 2040 objective.

The road map highlights the integrated nature of the strategy and the long-term nature of the actions required to deliver the expected level of change. This emphasises the importance of the five opportunities highlighted in the strategy:

- Creating a culture of positive action in housing and planning authorities to secure that Worcestershire is a dynamic, growing, and great place for everyone to live.
- Organising and actively collaborating in housing and planning authorities across Worcestershire. Taking assertive steps to meet the policies and aspirations that are set out in Development Plans.
- Using large scale development to set the standard for sustainable development including place-based amenities and services.
- Integrating affordable housing into new development in all communities.
- Engaging with, organising, and supporting public and private homeowners to meet net zero targets.

Transformation Roadmap





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REDDITCH BOROUGH COUNCIL
Executive 25th July 2023

Establishment of a Programme Office

Relevant Portfolio Holder	Luke Court - Cabinet Member for Finance and Enabling
Portfolio Holder Consulted	Yes
Relevant Head of Service	Pete Carpenter – Interim Director of Finance Deb Poole - Head of Transformation, OD and Digital Services
Report Author	Peter.carpenter@Bromsgroveandredditch.gov.uk d.poole@bromsgroveandredditch.gov.uk
Wards Affected	NA
Ward Councillor(s) consulted	NA
Relevant Strategic Purpose(s)	High Quality Services
Key Decision / Non-Key Decision	
If you have any questions about this report, please contact the report author in advance of the meeting.	
This report contains exempt information as defined in Paragraph(s) 3 of Part I of Schedule 12A to the Local Government Act 1972, as amended	

1. **RECOMMENDATIONS**

The Executive **RESOLVES** that:-

- 1) **Formal reporting of all projects is undertaken on a monthly basis by Officers and this information feeds into the Quarterly Finance and Performance Reports for Members.**
- 2) **That a compliance structure is put in place to ensure delivery of projects and management of the multiple interdependencies across projects. This includes:**
 - a. **A council programme office be established to provide oversight and validation of the delivery of projects across the organisation.**
 - b. **The roles of a programme manager and a programme officer be established to provide support for the delivery of this oversight, especially for ICT and Organisational Change projects across the organisation.**

2. **BACKGROUND**

- 2.1 An Audit Task Group, comprising of six members of Bromsgrove District Councils (BDC) Audit Committee, was established in early 2023 to investigate the reasons behind the receipt by BDC of a Section 24 Notice from its external auditors, Grant Thornton. The Audit Task Group was also tasked with providing recommendations for future similar project implementation, based on any lessons learnt. Redditch, at its Executive meeting on the 13th June, approved to implement the

recommendations of the Bromsgrove Task Group of Audit, Standards and Governance Committee.

- 2.2 One of the recommendations from the audit task group for BDC in respect of future complex and key projects was that:

A permanent Project Management Office be set up at BDC to support the full range of projects undertaken by the Council. This Project Management Office would report to CMT/ SMT as part of its remit.

- 2.3 High level corporate projects are reported quarterly to the Corporate Management Team and included as part of the Quarterly Finance and Performance Report. However, there are significant numbers of projects that fall below this category.
- 2.4 The Council already have a number of Officers trained to be project managers at Prince 2. These skills need to be realigned to ensure the staff are, where operationally possible, project managing Council projects.
- 2.5 Recently, the Corporate Management Team reviewed the number of projects that are either underway or planned to start across the organisation. Currently, this number stands at 59. These are set out in **Appendix A**. However, following the review of Projects that was undertaken in February and March an additional 29 projects were moved to "Business as Usual".
- 2.6 In establishing established the number of projects, they were then placed into one of four main categories:
- Economic Development and Regeneration.
 - Housing.
 - ICT Related
 - Organisational Change Related
- 2.7 All projects are expected to deliver to the Councils Project Management Framework. This is included in **Appendix B**.
- 2.8 As part of this framework, it is expected that for each project there is a Sponsor, and project manager and a business case, risk assessment, and project reporting.
- 2.9 Public Realm projects already have a governance structure in place called the "Project Governance" Group. This group, which covers projects managed on the Councils behalf by NWeDR and in house infrastructure projects, meets on a 6 weekly basis. Funding for large infrastructure projects include Programme and Project management.
- 2.10 There will be the need to set up a Housing Board which would need to meet on a 4 weekly basis. There is a board set up at the moment, but it was specifically set up to manage the implementation of the CIVICA system. It is proposed that this new Board covers all Housing projects (General Fund and HRA).
- 2.11 However, there are significant numbers of projects that fit into the ICT and Organisational Change categories. These projects generally require Council and 3rd party resource for delivery, and it is the management of the in house resource

that is the most acute issues as we are using the same “key” people for multiple projects. These projects can also link into Housing and Public Realm. As an example, for phase 2 of Civica CX, there might be up to 10 ICT related projects. These require careful coordination and management. This is just one example where a number of projects/initiatives will need to access the same internal resource.

- 2.12 For the ICT and Organisational Change projects there is the requirement for additional resource to:
- Prioritise projects
 - Prioritise resource to those projects
 - Coordinate across projects the interdependencies
 - Ensure projects are delivering – challenge delivery
- 2.13 It is envisioned that IT and Organisational Change projects will be assessed/ reviewed on a monthly basis as part of an extended “Back Office” Working Group with the Highlight Report template included in the Project Management Framework. Each project will be given a 10 minute slot. Outputs from these reviews will then form part of the monthly assurance report.
- 2.14 This resource will in addition coordinate overall project reporting across the 4 areas, including Governance and Housing projects, into a single monthly report for CMT via the monthly Assurance Meeting, and feed outputs into the Quarterly Finance and Performance Monitoring Report. This includes validating that delivery is taking place and ensuring projects are completed and closed off properly
- 2.15 Therefore, to manage and coordinate reporting overall and in particular ensure programme management for IT and Organisational change projects it is recommended that two roles of a Programme Manager and a Programme Officer be established to provide oversight of the delivery of these programmes and projects. Typically, the roles and responsibilities of these posts include the following activities, however these are not exhaustive lists.

Programme Manager

- 2.16 A Programme Manager would be responsible for overseeing and coordinating and critically challenge the execution of multiple related projects within the organisation. This would include planning, organising, and directing resources in a way that maximises efficiency and effectiveness. The role of a programme manager typically includes the following responsibilities:
- **Development of programme plans:** developing a comprehensive plan for the delivery of the programme, including timelines, budgets, and resource allocation.
 - **Coordinating projects:** ensure that all projects within the programme are aligned with the overall programme objectives and are executed according to plan. They would also be responsible for identifying and mitigating any risks and issues that arose.
 - **Managing programme resources:** responsible for managing programme resources, including people, budget, and equipment. This would involve ensuring that resources were allocated effectively and efficiently to achieve programme goals.

- **Monitor and report progress:** regularly monitor and report on the progress of the programme to senior management.
- **Communicating with stakeholders:** responsible for communicating with stakeholders, including project teams, senior management, and external partners. This would include providing regular updates, addressing concerns, and managing expectations.
- **Ensuring programme compliance:** ensure that all projects within the programme were complying with internal project management standards.
- **Managing programme finances:** responsible for managing the programme budget and monitoring projects within the programme to ensure they operating within the budgets allocated to them.

Programme Officer

2.17 A Programme Officer would be responsible for managing and coordinating and critically challenging various programs and projects across the councils. The role of a programme officer would typically include the following responsibilities and duties:

- **Project Management:** managing and overseeing the delivery of specific projects or programmes within the councils. This would include supporting the development of project plans in services, setting timelines, and monitoring progress against project milestones.
- **Stakeholder Management:** maintaining effective relationships with stakeholders, including senior leaders, contractors and service project teams. This would involve providing regular updates, managing expectations, and addressing any issues or concerns that may arise.
- **Budget Management:** managing program budgets and ensuring that expenditures are within approved limits. This would include working with the finance team to create budgets, track expenses, and manage cost variations.
- **Reporting:** provide regular reports on programme status and progress to senior management in SMT/CMT. This would involve preparing written reports and presenting them to the relevant parties.
- **Risk Management:** identifying and mitigating project risks. This includes conducting risk assessments, developing risk management plans, and implementing appropriate controls.
- **Performance Management:** monitoring the performance of project teams and contractors, ensuring that they are meeting program requirements and delivering work to the required standard.
- **Evaluation:** valuating the effectiveness of programs and projects against their objectives. This would involve gathering and analysing data, preparing evaluation reports, and making recommendations for improvements.
- **Planning:** being involved in the development of service business plans to ensure proposed projects are included in any programmes of work.

3. FINANCIAL IMPLICATIONS

3.1 Salaries for Programme Managers and Officers vary depending on the size and location of the council and the type of projects being delivered. Based on data from a sample of three job websites, Programme Manager salaries in local councils

range from between £40,000 to £60,000 per annum. Whilst Programme Officer salaries in local authorities range from £30,000 to £50,000 per annum.

The financial implications relate to the provision of additional salary budget as there are currently no Programme Manager or Programme Officer roles in the establishment. Having looked at current market salaries this provision is estimated at between £70,000 to £110,000 pa excluding oncosts.

- 3.2 With the Project Management Framework being fully complied with (part of the role of these positions) funding will be allocated from each individual project.

4. LEGAL IMPLICATIONS

- 4.1 There are no legal implications as a consequence of this report.

5. STRATEGIC PURPOSES - IMPLICATIONS

Relevant Strategic Purpose

5.1 High Quality Services

The establishment of additional programme management skills and resources will support the delivery of high quality services by ensuring corporate projects and programmes are delivered to a high standard with agreed objectives and outcomes being met.

Climate Change Implications

- 5.2 There are no climate change implications as a consequence of this report.

6. OTHER IMPLICATIONS

Equalities and Diversity Implications

- 6.1 There are no equalities implications as a consequence of this report.

Operational Implications

- 6.2 There will be a requirement for the programme office to report into a particular Head of Service or Director and for regular monitoring to be provided to the senior leadership team on a regular basis. There will also be a requirement for a technical system to be implemented that will support the monitoring of programme/project delivery.

7. RISK MANAGEMENT

- 7.1 The council have numbers of projects that are inert-related. This report ensures that they are managed at an appropriate level to ensure Council Priorities are met and resources properly allocated. Project management is a Corporate Risk monitored by the Risk Board on a quarterly basis.

8. APPENDICES and BACKGROUND PAPERS

Appendix A – Exempt Information

Appendix B - The Councils Project Management Framework

9. REPORT SIGN OFF

Department	Name and Job Title	Date
Portfolio Holder	Cllr L Court	
Lead Director / Head of Service	Peter Carpenter – Interim Deputy Section 151 Officer	
Financial Services	Michelle Howell – Head of Finance and Customer Services	
Legal Services		
Policy Team (if equalities implications apply) \	Deb Poole - Head of Transformation, OD and Digital Services	
Climate Change Officer (if climate change implications apply)	N/A	

Appendix A – Exempt Information

Bromsgrove District Council & Redditch Borough Council

Project Management Framework

Department	Business Transformation
Director/Head of Service	Head of Transformation & Organisational Development
Author(s)	Deb Poole
Document Ref	PMF03
Date	21.10.22
Document Version Number	V1.4

Version control

<u>Version</u>	<u>Date</u>	<u>Author</u>	<u>Rationale</u>
1.3	24.11.21	Deb Poole	Update following Audit September 21
1.4	21.10.22	Helen Mole	Update following Audit review Sept 22

Index

Page

1. Introduction	1
2. Project Type	2
3. Data Protection & Equality Impact Assessment information	3
4. Flow chart	4
5. The Framework	5
6. The Approval Process – The Business Case	5
7. The Project Board, Project Team and Stakeholders	6
8. The Business Case	10
9. Monitoring - Oversight by Corporate Management Team (CMT)	11
10. The Project Management Templates*	12
<ul style="list-style-type: none">• Project Scope Document• Project Plan• Highlight Report• Risk Register• Issue Log• Lessons Learnt• Project Closure Report	

1. Introduction

The Project Management Framework (Framework) provides the Council with a consistent, structured approach to the planning, implementation, management, delivery and monitoring of projects.

The framework uses many elements of the PRINCE2 Project Management Methodology (**PR**ojects **IN** Controlled **E**nvironments) and should be used in conjunction with the Councils Five Cases Business Case templates. The framework documents are designed to help answer the questions below, before work to deliver the project starts:

- What are we trying to do/achieve?
- When will we start?
- What do we need?
- Can we do it alone, or do we need help?
- How long will it take?
- How much will it cost?

These questions are usually asked at the start of any project. The answers are the building blocks of project management. They define what the project will do and the best way to do it. Structured project management orders the project into defined steps to make it logical and organised.

The framework indicates that a project should have:

- **An organised and controlled start** - organise and plan before starting.
- **An organised and controlled middle** - keep projects on track and controlled.
- **An organised and controlled end** - on completion, learn and document the experience, close off loose ends.

Almost anything that we do to achieve an outcome can be called a project. Using some or all elements from this framework will support the project process and provide documentation to demonstrate the steps taken, this would be good practice. Flow chart 3.

The framework is designed to be flexible and easy to use whilst ensuring projects are managed to a good standard. The use of a good project management methodology helps to ensure that projects deliver the desired outcomes. Use of the framework will also ensure that projects have:

- An approved business case - using the Five Cases templates
- A Project Board and Project Team
- An authorised start
- A structured plan for delivery
- Clear monitoring and reporting of progress
- A controlled finish
- A period of evaluation and lessons learnt

2. Project Type

Projects will fall into the following categories:

Project Category	Description	Approval, Management & Monitoring	Documentation to be completed
Category 1: Continuous Improvement	These are "Service improvement" projects. Usually within a service, change activity that should run alongside	This category of projects should be agreed/declined and resourced through the normal service management hierarchy and business planning process. Responsibility for initiating,	Project Scope document as minimum

	business-as-usual activities. Where managers are acting on what needs to happen, doing the right thing and making necessary changes.	justifying, and progressing these projects rests squarely with the Service Manager, it is a core part of role.	
Category 2: Service Innovation	These are change projects which aim to elevate service delivery, which demonstrate enterprise, and/or which are likely to require specialist/technical resource along with agreed funding outside of established budgetary boundaries.	This category of projects should be progressed through the normal service management hierarchy process but would require corporate approval and light touch monitoring. This is because they may: (1) be requesting resources outside the norm; (2) be of a different risk profile than the continuous improvement category; and (3) require new competences to be brought in.	Business Case http://orb.bromsgrove.gov.uk/Five Case Model Business Case Guidance.docx Corporate and/or Member approval process Report guidance may be required
Category 3: Corporate Projects	These are projects that have marked corporate or political impact, or where two or more service areas must work together. Has a need for significant resourcing, investment, and competence levels. Project would be deemed Business critical.	This category of projects must have corporate approval; clear project management disciplines; and close regular senior level monitoring.	Business Case http://orb.bromsgrove.gov.uk/Five Case Model Business Case Guidance.docx Corporate and/or Member approval process Report guidance may be required

3. Data Protection Impact Assessment

The Data Protection Impact Assessment (DPIA) is a risk assessment and an important means of evidencing our accountability under the requirements of the UK General Data Protection Regulations. You need to complete a Data Protection Impact Assessment (DPIA) if you are starting a project that involves or could involve any of the following:

- personal data*
- data sharing
- new systems for storage and access
- surveillance and monitoring
- using existing information in new ways

**Personal data means any information relating to an identified or identifiable living individual; one who can be identified, directly or indirectly, by an identifier such as a name, an identification number, location data, online identifier or to one or more factors specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that person).*

Processing of data cannot commence until the DPIA is signed off.

DPIA screening questions - Answer the following questions to find out if a full assessment is needed:

1. Will the project involve the collection of new information about individuals?
2. Will the project compel individuals to provide information about themselves?
3. Will information about individuals be disclosed to organisations or people who have not previously had routine access to the information?
4. Are you using information about individuals for a purpose it is not currently used for, or in a way it is not currently used?
5. Does the project involve you using new technology which might be perceived as being privacy intrusive? For example, the use of biometrics or facial recognition?
6. Will the project result in you making decisions or taking action against individuals in ways which can have a significant impact on them?
7. Is the information about individuals of a kind particularly likely to raise privacy concerns or expectations? For example, health records, criminal records or other information that people would consider to be particularly private.
8. Will the project require you to contact individuals in ways which they may find intrusive?

If the answer to any of these questions is yes, a full DPIA will need to be done. Please contact the Information Management Team for the form and associated guidance. Head of Business Transformation, Organisational Development & Digital has final sign off.

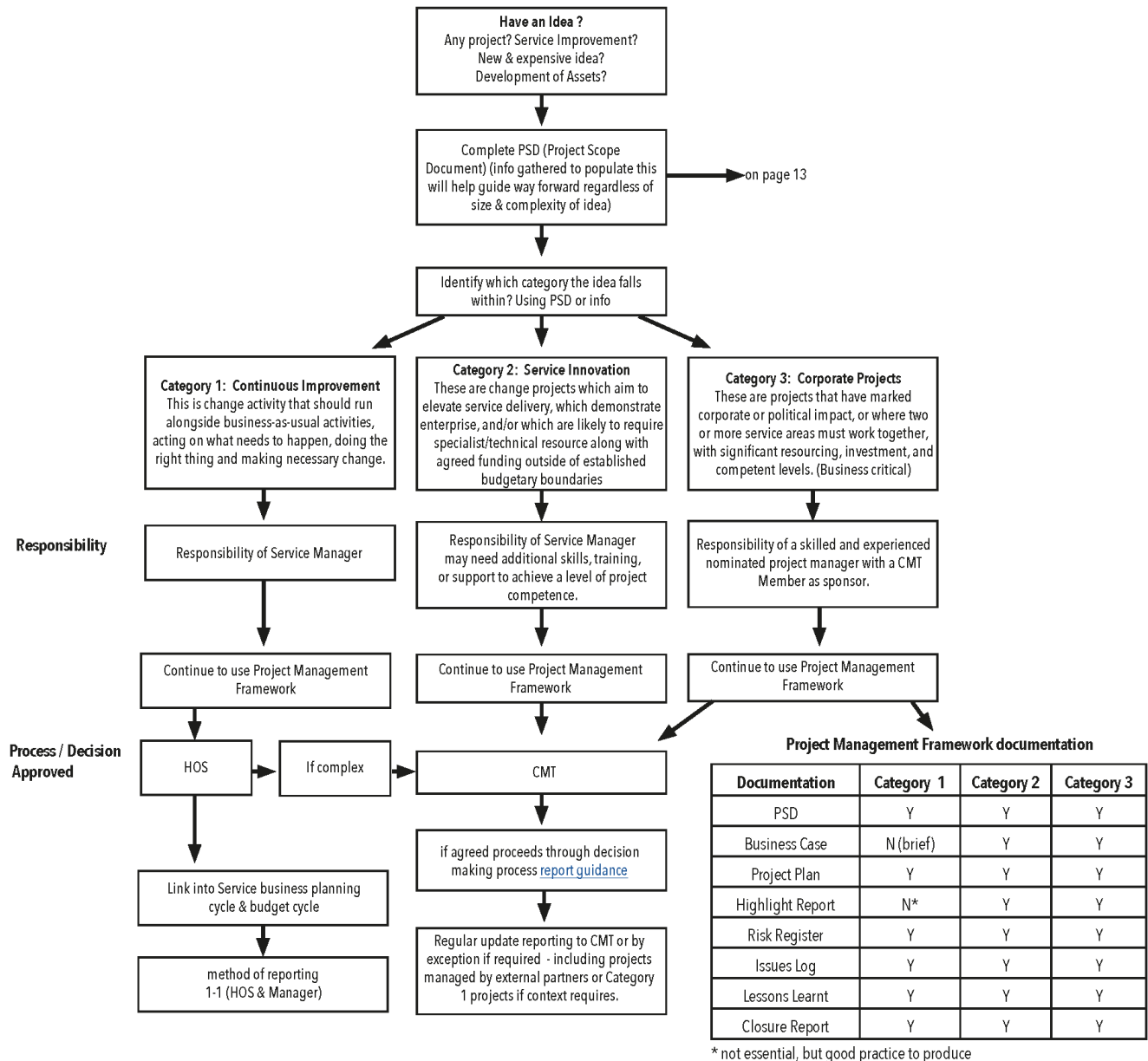
Equality Impact Assessment

Although the Equality Act 2010 does not specifically require Equality Impact Assessments to be carried out, we are legally required to demonstrate that we have given 'due regard' to eliminate unlawful discrimination, harassment, and victimisation; advance equality of opportunity and foster good relations. In practice this means that equality considerations still need to be evidenced in our decision-making processes and policies.

Any potential impact on equality should be considered before any key decisions are made and should be integrated into day-to-day policymaking, business planning and other decision-making arrangements. This is particularly relevant when making difficult financial decisions; if we are proposing to stop, reduce or change a service then we must have relevant equalities evidence to justify this. The Equality Assessment Guidance is available for officers on the Orb and the from the Engagement and Equalities Advisor in the Policy Team' Policy Team can provide direct support for service areas and projects to help them to gather and interpret equalities evidence.

4. Project Management – Flow chart

**Business Improvement Team to provide technical change and improvement support
and project management guidance to the project**



7. The Project Board, Project Team and Stakeholders

The Project Board

All category 2 and 3 projects should be overseen by a Project Board. This should be a **small** group primarily consisting of:

- Project Sponsor - Director/Head of Service
- Project Manager - external (in some cases) or internal (appropriately skilled ie: internally trained or Prince 2 Foundation and/or Practitioner)
- Senior Manager(s) from service(s) involved

The Project Boards role is to ensure the project delivers against the strategic objectives of the original business case, delivers the agreed outcomes, meets its deadlines for delivery and stays within allocated budgets. The Project Board, along with the Senior user, is responsible for reviewing risk throughout project and have the ability to suspend activity within a project if there are problems or if the project is failing in some way.

nxxn

The Project Board should meet regularly but less frequently than the Project Team. The Project Board should receive highlight reports, budget breakdowns and milestone delivery updates from the Project Manager at their board meetings. Where there is a technical issue or a specialists knowledge that needs explaining, it may be appropriate for key stakeholders to report individually to the board so there is no misunderstanding of the issue.

The Project Team

The Project Team should be brought together to discuss the project and establish roles. The team should consist of:

- Senior Responsible Officer – Project Sponsor from the Board (occasional attendance at project team meetings)
- Project Manager – internal and external (in some cases)
- Senior User(s) – Senior Managers from involved services, along with Project Board, responsible for reviewing risk throughout project.
- Senior Supplier(s) – Senior Managers responsible for delivery of the project, external supplier (in some cases).
- Service Representatives/Stakeholders – may have specialist knowledge from within the service(s) that will be needed to deliver the project
- Project Admin – for note taking, minutes etc

The Project Team should meet regularly, probably every two weeks in the early stages of the project. Frequency of meetings can be increased if there are problems or reduced if the project is progressing according to the project plan.

The Project Team should support the Project Manager to construct the Project Scope Document (PSD), the Project Plan and the Risk and Issue Logs. The Project Team should receive highlight reports, monitor risks, issues and costs as well as working to produce the key deliverables of the project.

Stakeholder Management and Stakeholder Engagement

Stakeholder engagement and management are some of the most important activities for successful project delivery. Stakeholders are individuals or groups with an interest in the project or programme because they are involved in the work or affected by the outcomes. Most projects and programmes have a variety of stakeholders with different, and sometimes competing, interests and influence which can affect the overall success or failure of the project.

Identifying stakeholders can be done using knowledge, research, discussions, checklists against project objectives/outcomes etc. The stakeholders and their areas of interest are usually shown in a table known as a stakeholder map (see Fig 1 below). Typical types of stakeholders will include:

- individuals and groups performing the work.
- individuals and groups affected by the work or the success/failure of the project.
- owners and customers (internal and sometimes external).
- statutory and regulatory bodies (if applicable)

Each stakeholder will then be classified according to potential impact. This is usually shown in a matrix that estimates interest and influence on a simple scale such as low/medium/high. Those with an ability to directly affect the outputs or benefits are sometimes referred to as key stakeholders.

Stakeholder Map

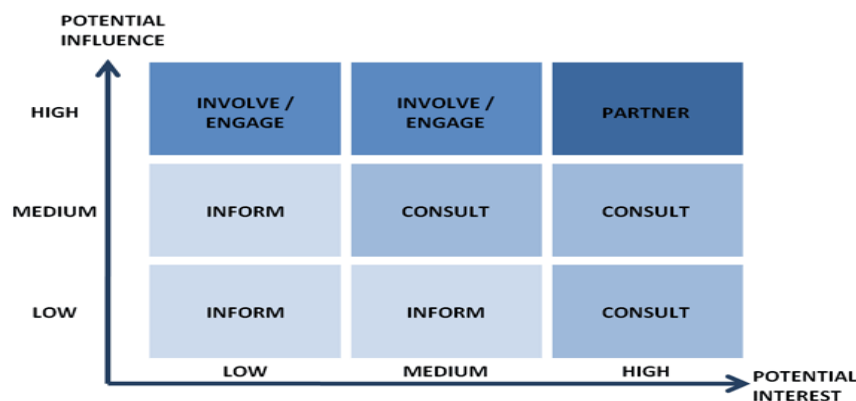


Fig 1 – Stakeholder Map

Stakeholder Engagement

Stakeholder engagement is the systematic identification, analysis, planning and implementation of actions designed to engage with stakeholders and is a vital activity. Stakeholder engagement uses a set of techniques that harness the positive influences and minimises the effect of the negative influences.

Project managers depend on people to respond to the outputs and benefits that they deliver. People will only respond if they are engaged. Project managers can make a substantial difference to the success of a project simply by understanding the stakeholders and what they want. To assist with this there are ten key principles of stakeholder engagement:

1. Communicate

Sharing information with stakeholders is important, but it is equally important to first gather information about the stakeholders to understand them and their motivations.

2. Consult, early and often

A project, in the initial stages, may be unclear to its stakeholders e.g., its purpose, scope, risks etc. Early and regular consultation will ensure that requirements are agreed, and a delivery approach negotiated that is acceptable to the stakeholders.

3. Remember, we are only human

Humans do not always behave in a rational, reasonable, consistent, or predictable way. By understanding the root cause of stakeholder behaviour, successful ways of working together can be developed.

4. Plan it!

A conscientious and measured approach to stakeholder engagement is essential. Investment in careful planning before engaging stakeholders can bring significant benefits.

5. Relationships are key

Good relationships build trust, so people work together more easily and effectively. Identifying and building stakeholder relationships can increase confidence across the project, reduce uncertainty, improving problem solving and decision-making.

6. Anticipate issues

Using foresight to anticipate issues and taking simple and timely actions with stakeholders can significantly improve project delivery. Understanding the stakeholders is key.

7. Just part of managing risk

Stakeholders are important influential resources and should be treated as potential *sources* of risk and opportunity within the project.

8. Compromise

Agree an acceptable baseline across the stakeholders' diverging expectations and priorities. Assess the importance of all stakeholders to establish a weighted hierarchy against the project requirements.

9. Understand what success is

Project success means different things to different people. It is important to establish what the stakeholder community perceives success to be for them in the context of project delivery.

10. Take responsibility

Stakeholder engagement requires everyone to understand and follow the right approach to communication and engagement. Good project governance requires clarity about stakeholder engagement roles and responsibilities and what is expected of people involved in the project.

Engaging with stakeholders requires the development of a communication plan, where appropriate strategies and actions can be defined to support engagement with stakeholders in various parts of the project or organisation.

Stakeholder Communication Plan

Communication with stakeholders is about keeping everybody in the loop. The communication plan defines the types of information to be delivered, who will receive it, the format for communicating it, and the timing of its release and distribution. It is important to make sure everybody gets the right message at the right time, in the right way.

It is important when defining a communication plan (see Fig 2) to analyse **what** kind of communication stakeholders need from the project. Projects produce a lot of information; so, it is important not to overwhelm stakeholders with all of it.

Methods of communicating can take many forms, such as written reports, conversations, email, formal reports, meetings, databases, schedules etc. The medium chosen, or **how** this information is shared, will depend on several factors, including the timing of **when** the information needs to be shared, access to appropriate technology, ability to use technology, frequency of meetings and the action required once information is shared (if any).

The types of information communicated typically include project status, project scope statements and updates, project budget information, risks, action items, performance measures, project acceptance, and so on. It is important that the information needs of the stakeholders be

determined as early in the planning phase of the project as possible so that the project manager and project team already know who should receive information and how they should receive it.

Communications with stakeholders who have prominent levels of interest and influence should be managed differently from those with stakeholders of low interest and influence. Similarly, communications with stakeholders who are inherently positive about the work will be different from those with stakeholders who are negative.

Communication Plan

Audience Who	Message What	Medium How	Schedule When	Responsible Who
Project Board	Highlight reports, Issues, Risks, Budget	Board meetings, project papers, e-mails, presentations	Monthly	Project Manager
Stakeholders	Issues, Risks, Project Plan	Project meetings, e-mails, Intranet	Monthly	Project Manager
Project Team	Project Plan, Issues, Risks	Project meetings, orb, e-mails	Weekly	Project Manager
CMT	Project progress	Presentation	Quarterly	Project Sponsor
Members	Project progress	Presentation	Quarterly (by exception)	CMT
Employees	Project progress, Impact	Newsletters, e-mails, presentation	Monthly or dependent on impact	Project Manager Project Sponsor
Partners	Project progress, Impact	Meetings, presentations	Dependent on partner involvement	Project Sponsor Project Manager

Fig 2 – Communication Plan

8. The Business Case

The business case provides decision makers, stakeholders and the public with evidence of transparent decision making and a framework for the delivery, management and monitoring of the proposal. Well thought out and robustly evidenced business cases will help the organisation to achieve its strategic purposes, deliver clearly defined outcomes and benefits to our communities or the organisation.

The organisation uses the approved Five Case Model for the development of business cases. This model has been used by Government departments and the wider public sector for many years. It comprises of the following five key components:

- The Strategic Case
- The Economic Case
- The Commercial Case
- The Financial Case
- The Management Case

Information about the approval process is detailed in section 6 on page 5.

This framework should be used in association with the Business Case Development Guidance document (available on the ORB) which includes guidance on the development of business cases and sample templates for use when constructing a business case. This document can be accessed via the link below:

<http://orb.bromsgrove.gov.uk/Five Case Model Business Case Guidance.docx>

9. Monitoring

As covered earlier in this document, the Highlight Report is used to report on stage progress and should be produced regularly by the Project Manager to report progress to the Project Board.

In addition to the Project Board, Corporate Management Team (CMT) require assurance around outcomes and overall project coordination, CMT therefore will assess quarterly, the status of Category 3 projects, Category 2 (ie: complexity/political or budget implications), and where applicable receive updates from projects led by third party organisations. Project Managers will be required to report on project scope, time, budget, approvals, direction of travel, phases and escalations.

CMT should be made aware of any concerns on projects not identified as requiring oversight (Category 1) at an early stage, so that a decision can be made as to whether to add it onto the corporate oversight/monitoring report. CMT will monitor the overall number of projects in each category to ensure there is sufficient specialist resources and budgets to manage and deliver all projects for the various services.

CMT will be responsible for deciding if projects require reporting to Members on, this will be by exception basis. Performance reports will be created by the Policy Team in conjunction with Heads of Service who will provide performance data on a quarterly basis. Any project updates that require reporting will be added into this report when necessary.

10. The Project Management Templates

Details and samples of all the documents required to plan and deliver a project are outlined below. Items for consideration have also been included in this documentation in italics. These items are based on experience gained from the delivery of other projects and are designed to reduce any issues or problems arising from the project management process.

Project Scope Document (PSD)

The purpose of the Project Scope Document (PSD) is to briefly outline the requirements for any project. It collates relevant information to move forward and helps guide the path of the project as it pulls together the purpose, financial information, roles and responsibilities. The PSD should be constructed either by the person(s) who wrote the business case or with their assistance and should be approved by the Project Board. If the project does not require a formal business case to be completed, the lead or service manager should complete a PSD as this will assist in gathering the information required to move forward such as financial, resourcing and ICT implications.

It should define the project, in order to form the basis for its management and an assessment of its overall success. The PSD gives the direction and scope of the project and (along with the Project Plan) forms the 'contract' between the Project Manager and the Project Board. It also:

- Ensures that the project has a sound basis before asking the Project Board to make any major commitment to the project
- Acts as a base document against which the Project Board and Project Manager can assess progress, issues and ongoing viability questions
- Provide a single source of reference about the project so that people joining the project team can quickly and easily find out what the project is about, and how it is being managed.

In the early stages of a project it is worth considering the following items:

- *Outline proposal and options for change - department responsibilities. Start to discuss this with Heads of Service/Managers. Who needs to be involved?*
- *Have the budgets been allocated for the project?*
- *What resources will be needed to deliver the project?*

- What are the customer implications?
- Will there be an impact on other services whilst the project is being delivered? How will this be mitigated?
- How will service be maintained during delivery of the project

Project Scope Document (PSD template)

Project Name:	
Prepared by:	Date:

1. Purpose

Define the purpose of the project and seek approval for the start of the project from the Head of Service or Project Board.

Project Definition and benefits

What the project is. What it will deliver. What are the expected benefits and planned outcomes for the community and/or organisation? Deliverables and benefits should be measurable wherever possible.

2. Current position

Investigation of the current position (Summary and Bullet points)

The deficiencies of the current position (Summary and Bullet Points).

The consequent risks arising from these deficiencies (Summary and Bullet Points).

Any other background information you consider relevant.

3. Proposal

Details of the new proposal or information from approved business case:

What is the proposal and why? or options available, for example:-

- Option 1 – (one line description only)
- Option 2 – (one line description only)
- Option 3 – (one line description only)

Option (x) was recommended and approved – (One line description).

4. Overview of the proposal

Provide a brief overview of the **recommended or approved** option, in particular, the nature of the recommended option, the impact on enabling services or support required from enabling or other services.

5. Costs

For the approved option provide brief revenue and capital costs and budget allocation.

6. Project Board and Project Team

Board Role	Nominee(s)
Senior Responsible Officer (Project Sponsor)	
Project Manager	
Senior User(s)	
Senior Supplier (internal and external)	
Project Administrator	

Team Role	Nominee(s)
Project Manager	
Deputy Project Manager (high complexity project and budget availability)	
Senior Supplier (internal and external)	

Service Representatives or Stakeholders	
Project Administrator	

7. Timescales

The project will start on (date) and finish on (date). Refer to the development of the Project Plan and any possible slippage or obvious risks to the delivery of the project.

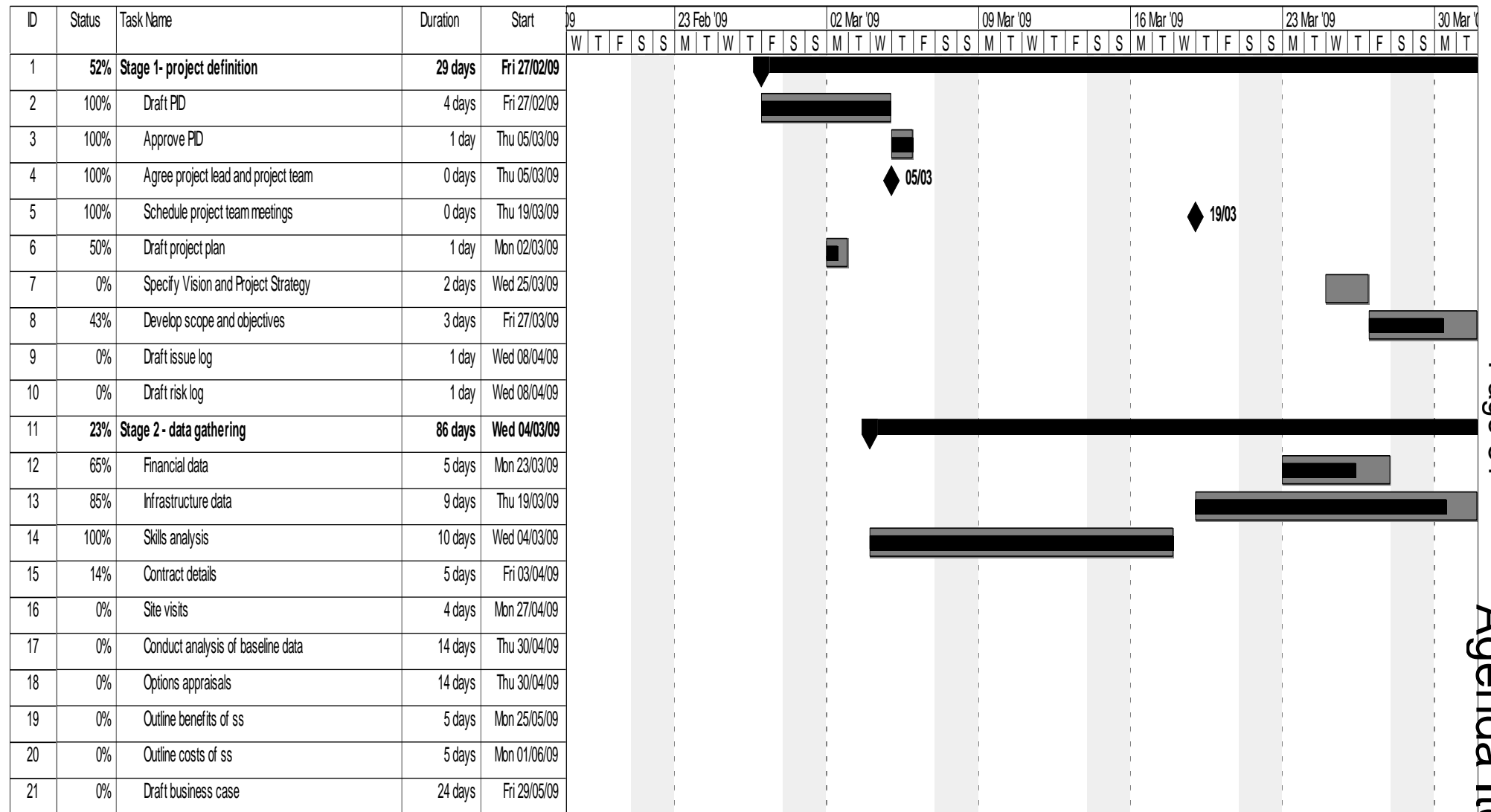
Project Plan

Project management involves the management of a variety of tasks and the people responsible for those tasks. It includes planning and scheduling tasks and controlling the budget associated with delivering an end-product, in a finite time period. The final outcome will produce a significant change in an organisation, service or community. Project management is not business-as-usual management.

The project plan is a time and dependency based schedule such as a Gantt Chart that provides a breakdown of all the tasks required to deliver the project. It also includes timescales and resources allocated to particular tasks. The project plan usually takes the form of a Gantt chart or spreadsheet (see sample below). The following will need to be included in the plan:

- Timeline for whole project
- Stages of the project
- Tasks required to deliver the project – these need to be detailed and any dependencies included.
- Start/finish dates for each identified task
- Resources allocated to each task
- Key milestones
- Key deliverables
- Communication points – relating to the communication plan
- Task dependencies – to other parts of the project or to other projects.
- Status of each task – how close to completion is it (usually expressed as a %)

Project Plan (Gantt Chart) - Example



Highlight Report

The Highlight Report is a report on stage progress and should be produced regularly by the Project Manager to report progress to the Project Board. The Highlight Report is used to confirm that the current stage of the project is running within tolerances and to indicate any possible future problems. The Highlight Report should provide a summary of progress against the project plan tasks and milestones and includes details about completed work, planned work, overall project status and financial information or spend to date.

Risks, issues and concerns are also included in this report but at a less detailed level than the Issue or Risk Logs (see later sections in this framework)

The Highlight Report should be produced using the approved template below and sent out to those involved in the delivery or monitoring of the project in accordance with the communication plan.

Highlight Report - Template

Project Name:			
Period ending:		Prepared by:	
Status:	Red / Amber / Green	% of Project Complete:	
Project Start date:		Projected Completion date:	
Summary position: <i>Provide an overall statement on the position of the project eg: milestones, deliverables etc</i>			
Planned activities for this period			
<i>List the activities that were planned for this period (which should be the same as the list of activities planned for next period on the previous report)</i>		Summarise progress against each activity	
Other progress for this period			
Detail any other progress achieved during the period.			
Planned activities for next period			
List the activities planned in the next period, with dates due.			
Risks, issues and concerns		Mitigating Action	
Summary of Project Benefits <i>(provide detail on project benefits, expected outcomes etc)</i>			
Detail project benefits as per business case			
Financial Update/Spend to date			

Risk Register - Template

The Risk Register captures and maintains the information (both threats and opportunities) on all identified risks that relate to the project. It provides a record of risks, including their status and history. It is used to capture and maintain information on all the identified threats and opportunities relating to the project. Information on the status of the risk, resolution or mitigation, is also included. The Risk Log template below should be replicated using an Excel spreadsheet to enable more complete information to be put into each section.

Risk ID	Author	Date Registered	Risk Category	Description			Probability H,M, L	Likelihood	Issue Response	Issue Status			Issue Owner	Issue Actioner
				Cause	Event	Effect				Initial	Current	Expected		
1			Budget											
2			People											
3			Customer											
4			GDPR											
5			Technical											
6			Reputation											

Issue Log

The purpose of the Issue Log is to capture and maintain information on all of the issues that are being formally managed. Issues that may impact on the successful delivery of the project should be logged on the Issue Log. The log should be set up at the start of the project and added to as the project progresses and more issues come to light.

Resolved issues should not be deleted off the log but retained for future reference, especially for the project completion/lessons learned stages. Issues should be highlighted and discussed at Project Team meetings or escalated to the Project Board if they are likely to disrupt or stop the progress of the project. The Issue Register should be monitored by the Project Manager on a regular basis

The Issue Log template below should be replicated using an Excel spreadsheet to enable more complete information to be put into each section

Issue Log – Template with sample data

Issue ID	Issue Type	Date Raised	Raised By	Issue Owner	Description	Priority	Severity	Status	Date of last update	Closure Date
1	Problem/Concern	12/09/21	A N Other	AB	Not confirmed decision for purchasing	HIGH	H	Closed	04/12/21	01/01/22
2	Resources	05/11/21	A N Other	CD	Budget for the new system	HIGH	M	Open	03/12/21	
3	Staff	07/11/21	F Smith	MO	Staff Engagement	HIGH	L	Closed	07/12/21	30/12/21

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7th June 2023

Lessons Learnt

Lessons learnt are the learnings gained from the process of managing and delivering the project and should be an on-going process throughout the life of the project. This activity should be encouraged by the project manager from the start of the project.

Project managers, stakeholders, team members and board members should all participate in the lessons learned process by reviewing the lessons learned report and making decisions on how to use the knowledge gained.

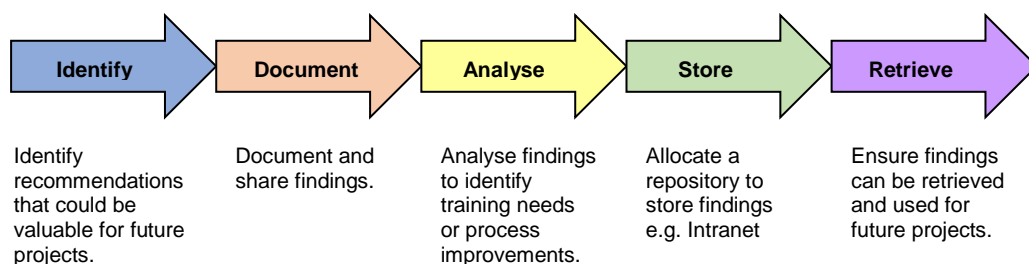
Sharing lessons learnt among project team members helps to prevent the repeating of the same mistakes and also allows the team to take advantage of organisational best practice. Innovative approaches and good work practices should always be shared with others. Lessons learnt should also be used to improve future projects and future stages of current projects.

It is not necessary to wait until the end of the project for the learning to occur. Lessons can be identified at any point during the project

The Lessons Learnt report should be started as soon as a point of learning has been identified. It should be logged by the Project Team and Project Manager and should be used to identify what was learnt by the project team about the planning, management and delivery of the project.

The Lessons Learnt Report should be detailed and ask questions about the whole cycle of the project. The report should be discussed at the Project Board and used to inform the delivery of other projects either in the same programme of work or separate projects where the learning can be applied.

The lessons learned process shown below outlines the five steps that define the activities required to successfully capture and use lessons learned. These are: identify, document, analyse, store and retrieve.



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7th June 2023

Lessons Learnt Report – Template with sample questions

Lessons Learnt Report
Project Title :
Date:
Prepared by:

What went well?

What would you want to do again next time?

What went less well and why?

What would you do differently next time?

Was there a clear definition of success? (Refer back to the PSD and Business Case)

Was it achieved?

How well were risks and issues managed?

Did the project team have the right skills in place?

Were there any training/skills development needs? If so, were they addressed?

Overall project management – How well was the project managed?

Opening and closing events – Did this happen? Were they a success?

Funding/budgets approach – did it work?

Communication approach – internal and external – did it work?

Any additional lessons learnt?

What recommendations would you make for any future projects?

Cabinet**7th June 2023**

Project Closure Report

The Project Closure process is used to detail how well the project performed against the benefit and acceptance criteria outlined in the Business Case and PSD. Project Closure is used to identify any outstanding items and to:

- Verify user acceptance of the project's products/outputs
- Ensure that project outputs can be supported after the project is disbanded.
- Review the performance of the project. This is done by comparing the project to the baselined documents eg: PSD, Business case etc.
- Assess the benefits already realised and plan a review of benefits that will be realised after the project is complete.
- Address outstanding issues and risks with a follow-up on action recommendations.

This information is provided to the Project Board as a Project Closure Report, as it is the Project Board that closes the project; it is the Project Manager who prepares the project for closure.

The Project Closure Report details the performance of the project. The Project Manager will use the Project Plan, Business Case and any other information from the Project Initiation Document to create the Project Closure Report.

The report should consist of two parts: the closure criteria and outstanding items. A clear plan of action for the outstanding items should be agreed with the Board. The board will need to decide if the outstanding items are such that the project cannot be closed until they are completed. If the Board are satisfied that the outstanding items are not critical to the successful completion of the project then it can be closed.

The report should be used to officially recommend closure and sign off of the project and should be taken to the Project Board when the project is completed. The Project Sponsor should sign the document once they are satisfied that the project has delivered its stated objectives.

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7th June 2023

Project Closure Report - Template

Project Closure Report
Project Title :
Date:
Prepared by:

The purpose of this report is to seek authorisation from the Project Board that the project has met its objectives and acceptance criteria as identified in the project business case and other project documentation, such as the Project Scope Document (PSD) and can be closed.

Closure Criteria

Category (as per Business Case and PSD)	Acceptance Criteria	Achieved (provide details)
Costs (Revenue & Capital)	Within budget (as defined in the business case)	Y/N
	Overspend	
	Underspend	
Objectives	Delivered (state as defined in the PSD, Business Case etc)	
Benefits	Delivered (state as defined in the PSD, Business Case etc)	
Deliverables	Completed	
	Accepted by Customer	

Outstanding Items

Item	Action	Owner
Task activities	List all activities and tasks that have not been completed (as defined in the project plan)	
Risks	List all business risks that have not been mitigated.	
Issues	List all business issues that are impacting on the business and have not been fully resolved.	
Costs	List any outstanding costs to be met.	

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7th June 2023

Signed:.....
.....

Project
Role:.....
....

Date:.....
.....

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